



LPL Financial and CXI Advisors Welcome Charles Hart

Jun 27, 2019

CHARLOTTE, N.C., June 27, 2019 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#), a leading retail investment advisory firm and independent broker-dealer, today announced that financial advisor Charles Hart CFP® has joined LPL Financial, aligning with the firm's broker-dealer platform and with CXI Advisors, a firm backed by CX Institutional on LPL's hybrid RIA platform. Hart reported having served approximately \$125 million of client brokerage and advisory assets*. He joins from Ameriprise Financial Services.

Hart has over 30 years of financial services experience, specializing in helping business owners and clients dealing with the loss of a spouse. The Plano, Texas-based advisor places an emphasis on developing deep client relationships and creating a personalized financial roadmap, helping each client navigate to their desired financial destination.

"Having the support of CX Institutional's turnkey asset management services and access to LPL's technology and platform will make it easier to provide strategic solutions to my clients, to create a plan that is just right for their needs," said Hart. "My clients often rely on me for support during the most pivotal moments in their lives. During those times of transition, I'm there to be able to help with the questions they have and the emotions they are feeling, including how they will maintain their lifestyle, are they prepared for the unexpected and are they making choices that will leave a legacy to their family."

"Charles is a wonderful individual in addition to being a top-notch financial advisor," said John Knowlton, director of corporate development, CX Institutional, currently serving over \$850 million in brokerage and advisory assets. "His experience and dedication to clients make us proud to welcome him to our team. We are excited to see the contributions he will bring to our firm and the enhancements he will make to the services we provide our clients."

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We focus on the needs of our advisors, so that they can focus on the needs of their clients. And what advisors need is more time and access to resources that make the work easier. We are committed to investing to deliver the innovative solutions and integrated technology capabilities that help our advisors work efficiently and create a differentiated experience for their clients. We welcome Charles to LPL and congratulate CX Institutional on their growth."

Read about other firms that recently joined LPL in the [LPL Financial News and Media section](#) of LPL.com.

About LPL Financial

LPL Financial (<https://www.lpl.com>) is a leader in the retail financial advice market and the nation's largest independent broker-dealer**. We serve independent financial advisors and financial institutions, providing them with the technology, research, clearing and compliance services, and practice management programs they need to create and grow thriving practices. LPL enables them to provide objective guidance to millions of American families seeking wealth management, retirement planning, financial planning and asset management solutions.

Securities offered through LPL Financial, Member [FINRA](#) / [SIPC](#). Investment Advice offered through CX Institutional, a registered investment advisor. CXI Advisors, CX Institutional, and LPL Financial are separate entities.

*Based on prior business and represents assets that would have been custodied at LPL Financial, rather than third-party custodians. Reported assets and client numbers have not been independently and fully verified by LPL Financial.

**Based on total revenues, *Financial Planning* magazine June 1996-2019

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Media Contact:

Lauren Hoyt-Williams
(980) 321-1232

Lauren.Hoyt-Williams@lpl.com



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