



LPL Financial Welcomes Charton Financial Group

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CHARLOTTE, N.C., July 22, 2019 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#), a leading retail investment advisory firm and independent broker-dealer, today announced that Charton Financial Group has joined LPL Financial's broker-dealer and corporate registered investment advisor (RIA) platforms. Edward Charton, principal of newly-formed Charton Financial Group, reported having managed approximately \$500 million of client brokerage, advisory, and retirement plan assets*.

He joins from FMS Financial Partners, an affiliate of Kestra Financial Partners.

Edward Charton began his financial services career in the insurance business, which morphed into a career in investments. For more than four decades, he has combined his experience to serve corporate clients, executives, business owners, individuals and families with employee and executive benefits, risk management planning, retirement planning, estate planning, investment management and high-level insurance planning.

Striking out on his own in Los Angeles with Charton Financial Group, Charton said he plans to "enhance services through a deep understanding of managing the assets of small business owners, executives and affluent families." The firm also welcomes Charton's son, Chad, who brings more than 15 years of insurance experience.

"We bring a unique set of skills to our new firm, in addition to a strong sense of teamwork," Charton added. "That teamwork combined with LPL's scale and deep well of resources will allow our clients to benefit from objective and comprehensive advice, helping them work toward their long-term financial goals. LPL's commitment to technology and marketing is especially attractive, and we believe it will allow us to offer our clients more without any additional costs."

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We welcome Charton Financial Group, a firm with a breadth of experience and a desire to tap into the full potential that exists for their business. There is more demand than ever for financial advice, and by expanding upon the services and support they can offer, they are able to reach clients across the full spectrum of wealth management. We look forward to connecting the team to the technology, tools and specialized resources that will help them grow in the ways that matter most to them and their clients."

More information about Charton Financial Group can be found at www.chartonfinancialgroup.com.

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 and advisory services offered through LPL Financial, a Registered Investment Advisor, Member FINRA/SIPC

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

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

LPL Financial and Charton Financial Group are separate entities.

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Media Contact:

Lauren Hoyt-Williams
(980) 321-1232

Lauren.Hoyt-Williams@lpl.com



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