LPL Financial and Gladstone Wealth Group Welcome CLH Wealth Management

Aug 7, 2019

CHARLOTTE, N.C., Aug. 07, 2019 (GLOBE NEWSWIRE) -- LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that financial advisor Cary L. Hall Jr., CEO of CLH Wealth Management, has joined LPL Financial broker-dealer and corporate registered investment advisor (RIA) platforms, aligning with LPL-affiliated firm Gladstone Wealth Group (Gladstone). Hall reported having managed approximately $160 million of client brokerage, advisory and retirement plan assets* and joins from UBS Financial Services.

“The independent model gives me more control over the wealth management strategies I use with my clients,” said Hall, a former Captain, having served 16 years in the United States Army. “This natural next step for my clients and I, allows me to enhance and elevate the service I provide them. I will now be able to tailor strategies on an individual basis even more while continuing to act in their best interest as we create a financial plan for their future.”

With a diverse base of clients, made up of attorneys, IT professionals, athletes, entertainers, veterans, retirees, professionals and organizations, Hall turned to Gladstone and LPL for flexibility and support in serving clients. “With Gladstone and LPL, I am not alone. I have access to the support I need with the freedom to operate my practice how I choose. And I like the fact that LPL provides a hands-on team that is guiding me through the transition process and beyond, offering access to products and services that address the needs of my clients.”

“We welcome Cary to the Gladstone team,” said Rick Frick, managing partner and CEO of Gladstone, now operating 34 offices with the addition of the Princeton, N.J. practice. “The combination of our team’s support with access to LPL’s technology and product offering creates a strong foundation for Cary to launch and grow his independent practice. We look forward to helping him be successful on his own terms.”

“The demand for our model continues to grow as advisors realize they have a choice in how they build their practice and serve their clients. LPL is committed to choice, with the belief that advisors know their clients best, and they should be able to build a practice that helps them deliver what their clients need and value,” said Rich Steinmeier, LPL Financial managing director and divisional president, Business Development. “We strive to be a long-term partner to advisors, providing the resources, technology, business solutions and model options to help them grow and evolve. We welcome Cary to LPL, and look forward to a lasting and successful partnership with him and with Gladstone."

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.
Gladstone Wealth Group provides investment advice through Gladstone Institutional Advisory, LLC, a registered investment advisor
Gladstone Wealth Group and CLH Wealth Management are separate entities from LPL Financial.

*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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