LPL Financial and IHT Wealth Management Welcome Kurt Yndestad

Sep 23, 2019

CHARLOTTE, N.C., Sept. 23, 2019 (GLOBE NEWSWIRE) -- LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that financial advisor Kurt Yndestad has joined IHT Wealth Management, affiliating with LPL's broker-dealer and hybrid registered investment advisor (RIA) platforms. Yndestad reported having served approximately $200 million of client brokerage, advisory and retirement plan assets*. He joins from J.P. Morgan Private Bank.

"I believe joining LPL and IHT gives me the ability to serve my clients more strategically. Having access to their wealth management platform and additional capabilities will allow me to provide customized advice suited to my clients," said Yndestad, who moves to LPL's independent platform after spending 30 years with full-service brokerage firms.

Working primarily with high-net-worth individuals, business owners and accounting partners, Yndestad's experience includes investments, financial planning, inter-generational wealth transfer and working with big four accounting firm partners to help ensure they meet their independent regulatory requirements. He said he works closely with clients to understand their financial objectives, develop an appropriate approach and monitor progress as they work toward those goals. Yndestad also serves on the board of the Pediatric Brain Tumor Foundation and supports the Shining Stars Foundation.

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We serve to empower wealth advisors with our independent platform, providing them with differentiated platforms and capabilities to serve the unique needs of their clients. We offer access to investment platforms with flexibility and customization to tailor investment strategies, and a technology platform with the tools and integration that saves advisors time and can bring more value to the client experience. Kurt and IHT understand well the complexity associated with the wealth management space and the level of service clients expect. We are proud to be their chosen partner for continued growth."

Read about other firms that recently joined LPL in the LPL Financial News and Media section of LPL.com.

Advisors learn how to take a proactive approach in the progression and future planning of your firm.

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.
IHT Wealth Management and LPL Financial are separate entities. Additional Advisory services offered through IHT Wealth Management.
*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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