LPL Financial

Applewhite Tyll Retirement Planners Join Linsco by LPL Financial

Aug 19, 2021

Employee advisors open new office in Richmond, Va.

CHARLOTTE, N.C., Aug. 19, 2021 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Tracy Applewhite and Sean Tyll have joined LPL, affiliating with Linsco by LPL Financial, the firm's employee advisor model. They reported having served approximately $185 million in advisory, brokerage and retirement plan assets*. They join LPL from Wells Fargo Advisors and will be the anchor tenants for a new Linsco office in Richmond, Va.

Applewhite and Tyll partnered in 2017, recognizing that by combining their unique backgrounds and perspectives they could do more for their clients. They take a team approach as they help clients navigate the four cornerstones of comprehensive wealth management: investments, liability management, risk management and estate planning strategies. Although they have a broad client base, their niche is working with clients who are contemplating retirement or have already retired.

Looking to elevate the client experience and take more control of the business, they chose to move to LPL and rebrand their practice to Applewhite Tyll Retirement Planners. "We took a look at our practice and how the market is changing, and strategically this move gives us the resources to do more for our clients," Tyll said, noting that he is especially looking forward to having a social media presence to help deepen the connection with clients and reach new prospects. "We really want to have that hometown feel and be more involved in the community. By joining LPL, we can keep our clients' best interests at the forefront of everything we do."

'Exciting' support from Linsco

In selecting a new partner, the advisors said Linsco stood out. "What LPL offers with Linsco is really exciting," Applewhite said. "We own our practice, but we do not have to worry about the operations side of the practice. It allows us to focus on clients' first and really give them the white glove service they deserve. Ultimately, everything we do is to benefit our clients."

Linsco advisors have brand autonomy and the ability to make decisions on how to best run their practice. With access to LPL's integrated wealth management platform and sophisticated resources, advisors are also equipped with everything they need to run a thriving practice and create differentiated experiences for clients. On top of this, Linsco advisors receive an additional layer of comprehensive turnkey support such as a dedicated marketing consultant, administrative professional services and an experienced branch management team to help support the goals of their business.

With the launch of Applewhite Tyll Retirement Planners, LPL will open a new office in Richmond that will have space for several additional Linsco advisors and their teams. This is the second Linsco office to open this summer, with the other based in Raleigh, N.C.

Scott Posner, LPL executive vice president, Business Development, said, "We are excited to welcome Tracy and Sean to the LPL community. At LPL, we are committed to creating a differentiated and compelling experience for both advisors and their clients. We deliver independent solutions designed to meet advisors where they are in the evolution of their practice, providing them with choice and flexibility in how they manage and grow their business. We look forward to a long-lasting, productive and exciting journey ahead with Applewhite Tyll Retirement Planners and are excited to expand the Linsco presence in Richmond."

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Inside the Linsco by LPL Financial model

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About LPL Financial:

LPL Financial (Nasdaq: LPLA) was founded on the principle that the firm should work for the advisor, and not the other way around. Today, LPL is a leader** in the markets we serve, supporting more than 19,000 financial advisors, 800 institution-based investment programs and 450 independent RIA firms nationwide. We are steadfast in our commitment to the advisor-centered model and the belief that Americans deserve access to objective guidance from a financial advisor. At LPL, independence means that advisors have the freedom they deserve to choose the business model, services, and technology resources that allow them to run their perfect practice. And they have the freedom to manage their client relationships, because they know their clients best. Simply put, we take care of our advisors, so they can take care of their clients.

*** Top RIA custodian (Cerulli Associates, 2019 U.S. RIA Marketplace Report); No. 1 Independent Broker-Dealer in the U.S (Based on total revenues, Financial Planning magazine June 1996-2020); No. 1 provider of third-party brokerage services to banks and credit unions (2019-2020 Kehrer Bielan Research & Consulting Annual TPM Report); Fortune 500 as of June 2021.*

**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.*

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