LPL Financial

All Women Team, Taylor Wealth Management, Joins LPL Financial

August 31, 2021

CHARLOTTE, N.C., Aug. 31, 2021 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq:LPLA) announced today that financial advisor Allison Taylor and the team at Taylor Wealth Management have joined LPL Financial's broker-dealer, corporate registered investment advisor (RIA) and custodial platforms. Taylor reported having served approximately $295 million in advisory and brokerage assets*. She joins LPL from Wells Fargo Advisors.

Taylor's mission and commitment to her clients is to always keep moving forward—something she's kept front of mind throughout her entire career. She started as a loan agent at a local bank before quickly recognizing that she was better suited for a career as a financial advisor. "I love building relationships that span generations and knowing that my work makes a significant difference in each client's life," Taylor said.

Over the last two decades, Taylor built her practice from the ground up while constantly being reminded that she is part of a heavily male-dominated industry. Referencing a report from Cerulli that states just 18.1 percent of financial advisors are women, Taylor said, "It's still very much a man's world. You have to be good to compete. I worked six days a week, drove an hour each way to my first job and had two babies while trying to become a financial advisor. But it's been the most rewarding career, and I'm so proud of the team I've built."

Based in Huntington Beach, Calif., the Taylor Wealth Management team also includes Taylor's daughter, Jordan McDole, who serves as the firm's operations manager, and Kaitlyn Chuong, client relationship manager. The trio of women make it a priority to understand each client's unique financial situation, and they take a hands-on approach to helping clients develop comprehensive financial plans. Education is another key focus for Taylor, as she makes a point to break down complex concepts to help clients better understand the financial landscape.

In the spirit of always moving forward, Taylor chose to move her business to LPL as she begins a new journey as an independent financial advisor. "My values align with LPL and I truly appreciate that LPL's culture is all about supporting the advisor," she said. "With this move, I believe I will have more freedom to put my clients' best interest first, along with the flexibility to build out my practice as I see fit."

Taylor also appreciates the ability to brand her business, and looks forward to having more of a community presence. She plans to hold monthly financial education workshops and will also build out a robust, personalized website to include a learning center with useful information that could benefit her clients and the public.

In moving to LPL, she recognized the firm's commitment to diversity and looks forward to joining LPL's community of women advisors. "I'd love to be a mentor and an example to show other women that they can be good business owners and run an ethical practice, without having to compromise on integrity," Taylor said.

Scott Posner, LPL executive vice president, Business Development, stated, "We extend a warm welcome to Allison, Jordan and Kaitlyn and are honored they turned to LPL to create their perfect practice. We understand what it takes for advisors to thrive in the independent space, and we are committed to making investments in innovative technology and robust business solutions designed to help them differentiate their business and take care of their clients. We are also deeply committed to fostering connections between our advisors and welcome Allison to LPL's active women advisor business community. We wish her great success in the launch to independence and look forward to a long-lasting relationship with Taylor Wealth Management."

Learn more how LPL supports Women Advisors.

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

Advisors, find an LPL business development representative near you.

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 1996-2021); No. 1 provider of third-party brokerage services to banks and credit unions (2020-2021 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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