LPL Financial

LPL Financial Welcomes Family-Run Vande Bossche Financial Planning & Wealth Management

Sep 9, 2021

CHARLOTTE, N.C., Sept. 09, 2021 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq:LPLA) announced today that financial advisor John Vande Bossche and the team at Vande Bossche Financial Planning and Wealth Management have joined LPL Financial's broker-dealer, corporate registered investment advisor (RIA) and custodial platforms. The family team reported having served approximately $380 million in advisory, retirement plan and brokerage assets*. They join LPL from Northwestern Mutual.

After a successful career in corporate management, Vande Bossche recognized that financial management was his niche. He took a leap of faith to join the financial services industry in 2003, and quickly found his new career extremely rewarding as he helped clients work toward their financial aspirations. He viewed their achievement as his own. Over the years, his Anaheim, Calif.,-based practice blossomed into a true multigenerational family-run business. Vande Bossche is now joined by his wife, Mary Vande Bossche, director of operations, as well as their daughter, financial advisor Kristen Marie Nielsen, CFP®, RICP®, and son Patrick Vande Bossche CIMA, who serves as analyst and marketing director. Rounding out the team is Timothy Mitchell CFA, director of investments, and longtime assistant Jennifer Moses.

The versatile team provides a wide range of services, including individual investment and portfolio management, comprehensive financial planning and creating retirement plans for business owners. Vande Bossche considers himself a "family advisor" who centers his practice around doing what's right for clients and their families. He takes pride in seeing his own family take care of other families, and recognizes that his legacy will continue long after his retirement.

"Watching Patrick and Kristen develop their interests in my line of work and grow into their roles today is a dream come true," Vande Bossche said. "Their work has helped us enrich our offerings and break into a younger client demographic. We position ourselves on the market as an intergenerational team that caters to multiple generations of families. We have a clear succession plan for our firm, so clients can rest assured that we will take care of their investments and help manage their financial future for generations to come."

Why LPL is their first choice
The transition to LPL comes five years after the team began looking for a long-term partner. They conducted extensive interviews and came to the conclusion that LPL's integrated technology, financial planning offerings and investment platforms stood out as an industry leader.

"Our key focus areas were to create a differentiated client experience and ensure business continuity, and LPL offers solutions for all of our priorities," said Nielsen, the firm's director of financial planning. "LPL's sophisticated capabilities and platforms will enable us to transform client experience and broaden investment options. We are excited for our clients to have a frictionless online experience and receive the highest level of customer service. Most importantly, we can see ourselves having a long-term partnership with LPL, which strives to evolve with the industry and innovate its technology."

Scott Posner, LPL executive vice president, Business Development, stated, "We are honored to have John and the entire Vande Bossche team as part of the LPL family. Everything we do at LPL is designed to provide advisors with the support they need to run a successful practice. Their greatness is our goal. We will continue to invest in new capabilities and solutions designed to help advisors grow their business, personalize their practice and deliver differentiated service experiences to their clients. We look forward to having a long-lasting partnership with the entire Vande Bossche team."

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.

Securities and advisory services offered through LPL Financial LLC, an SEC- registered broker-dealer and investment advisor. Member FINRA/ SIPC

Throughout this communication, the terms “financial advisors” and “advisors” are used to refer to registered representatives and/or investment advisor representatives affiliated with LPL Financial LLC. We routinely disclose information that may be important to shareholders in the “Investor Relations” or “Press Releases” section of our website.

Vande Bossche Financial Planning and Wealth Management and LPL Financial are separate entities.

Connect with Us!

https://twitter.com/lpl

https://www.linkedin.com/company/lpl-financial

https://www.facebook.com/LPLFinancialLLC

https://www.youtube.com/user/lplfinancialllc

Media Contact:
Lauren Hoyt-Williams
(980) 321-1232
Lauren.Hoyt-Williams@lpl.com