LPL Financial

All-Woman Team, NorthShore Financial Strategies, Joins LPL Strategic Wealth Services

September 20, 2021

CHARLOTTE, N.C., Sept. 20, 2021 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq:LPLA) announced today that financial advisors Carrie Turcotte CFP®, RIPC, and Crystal Walker CFP®, CRPC, CKA of NorthShore Financial Strategies, have joined LPL Financial's broker-dealer, corporate registered investment advisor (RIA) and custodial platforms, affiliating with the LPL Strategic Wealth Services (LPL Strategic Wealth Services) model. The advisors reported having served approximately $230 million in advisory, brokerage and retirement plan assets*. They join LPL from Wells Fargo Advisors Financial Network.

Based in Chattanooga, Tenn., the NorthShore team offers personalized financial guidance with a focus on women, high-net-worth clients, financial coaching and charitable gifting strategies. The advisors, along with licensed support staff members Jamie Climer and Julie Weddle, have a combined 75+ years of industry experience.

"This is our life's work and our passion," said Turcotte, a third-generation financial advisor. "Much like our clients, we wear many hats in our roles as mothers, caregivers and career women. We understand how busy life can be, and want to serve as a resource for clients in financial conversations, and to quarterback their overall financial strategy."

"We have a holistic approach to understanding each client's comprehensive needs, and take great pride in creating a plan to help clients work toward their financial goals," Walker said.

The entire NorthShore team is deeply committed to taking care of their clients, as well as giving back to the community. Walker is a board member for Teen Challenge of the Mid-south Adult Center. Turcotte was also on the board of the Northside Neighborhood House and led worship at a local church before having her two daughters. She also served on industry boards, including the IRI Advisor Panel.

Enhanced client care with LPL Strategic Wealth Services
Over the last few years, the NorthShore practice has grown significantly and the team recognized the need to find a new wealth management partner to help ensure the same high level of service their clients have come to expect. "We interviewed several firms and determined that the boutique service model of LPL Strategic Wealth Services would be the ideal partnership to serve our clients," Walker said.

"Not only will this take compliance management off our plates, but it will also allow us to provide an enhanced level of client care by providing additional time for us to focus on our top priority—our clients," Turcotte said.

LPL Strategic Wealth Services advisors have access to LPL's integrated wealth management platform and sophisticated resources needed to run a thriving practice, as well as an additional layer of ongoing, personalized support for daily operations and long-term business management. LPL Strategic Wealth Services offers a dedicated team of LPL partners who both consult and execute business tasks. This includes a business strategist, technology partners, a CFO and marketing support, allowing advisors to stay focused on the enduring needs of their client, culture and evolution of their practice.

The move to LPL also gives the NorthShore team the opportunity to enhance their service offerings with the addition of hourly consulting and flat fee financial planning, using integrated financial planning software programs designed to elevate the client experience. "We were impressed with LPL's commitment to building and maintaining relationships, as well as substantially investing in technological solutions that will enhance the depth of planning and client care that we're able to offer," Walker said.

Scott Posner, LPL executive vice president, Business Development, stated, "We are excited to welcome the first all-woman team to the LPL Strategic Wealth Services program. It's clear that Carrie and Crystal have a strong commitment to their clients, providing meaningful insights and hands-on service as they help each individual work toward their financial goals and dreams. We are honored they recognized the value of LPL's independent platform and the LPL Strategic Wealth Services model for the next chapter of their business. LPL continues to invest more than $1 billion a year in our sophisticated wealth management platform, robust business resources, workforce and growth capital to help advisors differentiate their practice and be successful serving the needs of their clients. We look forward to a long-lasting partnership and exciting journey ahead with the entire team at NorthShore Financial Strategies."

Learn more about NorthShore Financial Strategies.

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 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.

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.

NorthShore Financial Strategies and LPL Financial are separate entities.

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