



LPL Financial Welcomes Progressive Financial Concepts

Mar 24, 2021

CHARLOTTE, N.C. – March 24, 2021 – [LPL Financial LLC](#) today announced that Progressive Financial Concepts has joined LPL Financial's broker-dealer, corporate registered investment advisor (RIA) and custodial platforms, aligned with The Wealth Consulting Group (WCG), a large enterprise supporting LPL advisors. The Progressive team reported having served approximately \$450 million in advisory, brokerage and retirement plan assets*. They join LPL from Sagepoint Financial, part of the Advisor Group network of broker-dealers.

Based in Scottsdale, Ariz., the team of financial advisors includes Kory Budinger, Michael Apsell, Eric Black, Greg Morell, Stan Waldrop and Brian West. The advisors have worked together for more than 20 years, taking an integrated team approach to provide multigenerational wealth management and retirement planning for closely held businesses and individuals. They are supported by five administrative staff members.

The team's passion for helping others extends beyond the office. The advisors are all charitably-minded and spend significant time supporting organizations in their community, including the Chandler Compadres, Boys & Girls Clubs of the East Valley, Future Farmers of America, American Diabetes Association and a local medical clinic.

Why Progressive chose LPL and WCG

The team turned to LPL and WCG for [enhanced technology](#) and differentiated service experiences. "Since we share client relationships across our team, we needed a partner like LPL that makes significant investments in integrated capabilities that allow us to easily access the latest customer information. With ClientWorks, which is in sync with DocuSign and our CRM software, we have access to a broad range of tools designed to help us give our clients a service experience that we believe they can't find anywhere else," Budinger said, also calling LPL's client-facing technology a "game changer." "We've also known the team at WCG for a long time and believe that their support will help us deliver a very comprehensive wealth management service for our clients."

Scott Posner, LPL executive vice president, Business Development, said, "We welcome the Progressive team to the LPL family and are honored to be their chosen partner as they continue to differentiate their practice and elevate the service they provide to clients. At LPL, we are deeply committed to making continuous investments in service and support so our advisors can feel confident and cared for. We also continue to invest in innovative digital capabilities and resources that we believe can bring the most value to our advisors and help them win in the marketplace. Congratulations to Jimmy Lee and the team at Wealth Consulting Group for continuing to grow its quality network of 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 17,000 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 Kehler Bielan Research & Consulting Annual TPM Report)*

*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.

Progressive Financial Concepts, The Wealth Consulting Group and LPL Financial are separate entities.