



LPL Financial Welcomes Financial Advisor Kip Adams and Team

Apr 14, 2021

CHARLOTTE, N.C. – April 14, 2021 – [LPL Financial LLC](#) today announced that financial advisor Kip Adams and his team have joined LPL Financial's broker-dealer, hybrid registered investment advisor (RIA) and custodial platforms, aligned with HUB Retirement and Wealth Management. Adams reported having served approximately \$800 million in retirement plan, advisory and brokerage assets*. He joins LPL from Kestra Financial.

Based in Fort Worth, Texas, Adams is the Retirement and Private Wealth practice leader for Gus Bates Insurance & Investments, a division of HUB International Texas. His team includes retirement plan advisor Blake Hiatt, wealth advisor Spencer Stilwell, senior account manager Susan Blasingame and two additional staff members. The firm was recognized in 2020 as a National Association of Plan Advisors (NAPA) Top DC Advisor Team***.

Adams, spent a decade of his career in public accounting with a focus on retirement plan consulting prior to joining the financial advice industry 14 years ago. His roots are in retirement planning and employee benefits, but as the team evolved over the years, their services expanded to include comprehensive wealth management. "We help our clients understand that the financial decisions they make today have an incredible impact on their future," said Adams, an avid golfer, is the immediate past president of Colonial Country Club as well as past Chairman of the Board for Goodwill Industries of Fort Worth.

Why Kip Adams chose LPL Financial

Since moving to LPL, Adams and team have continued to find ways to elevate their practice. "We believe LPL has the resources, services and scale to really help us differentiate our business. We've found that LPL's trading platform is incredibly easy to use and the level of [innovative technology](#) has already improved how we open new accounts and manage our business," Adams said. "Everyone we've talked with at LPL has been terrific and it's clear they care about our business."

Scott Posner, LPL executive vice president, Business Development, said, "We extend a warm welcome to Kip, Blake, Spencer and Susan and congratulate HUB on its continued growth. LPL's mission is to support our advisors, and we do that by helping them create differentiated practices and win in their markets. We will continue to use our size and scale to create value for our advisors, including making investments in the integrated technology and business resources that can help them be more successful by serving their clients efficiently and effectively. We look forward to supporting Kip's team and HUB for years to come."

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.*

****To be a NAPA Top DC Advisor Team, nominees had to be individual advisor team/offices with a defined contribution book of business, in a single physical location. To be considered, firms had to submit responses to an application form, including information about their practices, notably their defined contribution (DC) assets under advisement. The list is created and conducted by the National Association of Plan Advisors, an affiliate organization of the American Retirement Association, a non-profit association. No fee is charged to participate. The rating is not indicative of the nominee's future performance.*

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.

Additional investment advice offered through Global Retirement Partners (GRP), a registered investment advisor. Gus Bates Insurance & Investments, a division of HUB International Texas, GRP, HUB Retirement and Wealth Management, and HUB International are not affiliated with LPL Financial.