



Seapoint Wealth Advisors Launches with Support of LPL Financial

Apr 28, 2021

CHARLOTTE, N.C. – April 28, 2021 – [LPL Financial LLC](#) today announced that financial advisor Chad Taylor CFP®, has launched a new independent practice, Seapoint Wealth Advisors, through affiliation with LPL Financial’s [Strategic Wealth Services](#) (LPL Strategic Wealth Services) model designed to support the unique needs of breakaway advisors. In addition to leveraging LPL’s integrated wealth management platform to support his practice, the LPL Strategic Wealth Services model delivers ongoing, personalized support for daily operations and long-term business management. Taylor reported having served approximately \$215 million in advisory, brokerage and retirement plan assets*. He joins LPL from UBS Financial Services.

Based in San Diego, Taylor began his financial services career in 1997. Today, he works primarily with high-net-worth families and small businesses on wealth creation and preservation strategies. He is joined by Sarah Izidoro, director of client services, and his wife, Elizabeth Taylor, office manager.

Through the years, Taylor’s investment process has helped guide his clients through some challenging market conditions. Personal attention, open communication and exemplary service stand as the fundamentals of his service commitment. After considering what’s best for their clients, Taylor and his team chose to launch an independent firm and brand it as Seapoint Wealth Advisors. In naming the firm, Taylor wanted to highlight the importance of recognizing the various points encountered throughout life. “Much like the sea, it is calming when life is on a smooth path, but we can experience brief periods of turbulence when unpredicted changes occur. Our goal is to help our clients navigate those periods of turbulence and point them in the direction of long-term success,” said Taylor, a father of four who maintains close community ties with groups such as the Helen Woodward Animal Center, Pink Journey, Rady Children’s Hospital and The Navy Seal Foundation.

Taylor chose to join LPL to run a business on his own terms, while also being able to focus on what he loves most about his job—interacting with his clients. “The independent model offers more freedom and flexibility, and also makes it easier to work with my clients. I’m going from being a W2 employee to the owner of a company where I have more control on how we manage clients and accounts. This move fulfills my goal of creating a firm that provides a higher level of service where we can offer advice customized to each client’s specific situation,” Taylor said, adding he especially appreciates the ability to choose his own technology for portfolio management.

Committed support from LPL Strategic Wealth Services

As a longtime resident of San Diego, Taylor said he’s “been a fan” of LPL for years, and he knows many members of the firm’s management team. However, he said, it was the LPL Strategic Wealth Services offering that opened up the door to his move. “When I learned about the LPL Strategic Wealth Services package—the ability to have marketing, CFO, technology support, a remote assistant and even real estate sourcing—I knew this was the right fit for me,” Taylor said. “I’m really comforted by the fact that I can manage the practice and focus on my clients, knowing I have a whole team at LPL to help run the business and take care of the daily operations.”

As a new business owner, the LPL Strategic Wealth Services channel bridges the transition to independence for Taylor and his team by providing them with dedicated support and services to launch their practice, including real estate build out, brand development, technology setup and HR support. In addition, LPL provides ongoing administrative, marketing and CFO services to the Seapoint team. All this is in addition to having access to LPL’s innovative technology, integrated platforms and sophisticated resources needed to run a thriving business.

Scott Posner, LPL executive vice president, Business Development, said, “We are honored to welcome Chad, Sarah and Elizabeth to LPL and congratulate them on the launch of their new independent business. We understand that successful advisors like Chad want the freedom to choose the products that best meet their clients’ needs and the autonomy to shape and enhance the client relationships. The LPL Strategic Wealth Services model offers a truly tailored experience to help breakaway advisors move to the independent space with personalized support each step of the way—from planning through the transition to ongoing business support. We look forward to a long-lasting partnership and exciting journey ahead with Seapoint Wealth Advisors.”

Learn more about [Seapoint Wealth 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.

**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.*

*** 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)*

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

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Seapoint Wealth Advisors and LPL Financial are separate entities.