



Industry Veterans Launch NJ-Based RIA Talisman Wealth Advisors

May 20, 2021

CHARLOTTE, N.C. – May 20, 2021 – [LPL Financial LLC](#) today announced that financial advisors Jennifer Kirby and Frank Granizo launched their new RIA, Talisman Wealth Advisors, and selected LPL Financial as their custodian. The principals of Talisman most recently operated as The Granizo Kirby Group at Merrill Lynch and reported having served approximately \$150 million in advisory assets*.

Granizo is an industry veteran with more than 20 years of experience as a financial advisor. Kirby entered the business about eight years ago after more than a decade in fundraising and public relations, where she gained operational and financial management experience working with donors and wealthy individuals. The two teamed up in 2018 after discovering they shared similar views on planning-focused, high-touch wealth management for their client base of business owners, multigenerational families and women.

They co-founded the new Mountainside, N.J.-based independent wealth advisory firm to provide insight and advice free from the constraints and conflicts inherent in large institutions and banks. “In the new reality of financial advice, we are seeing that the relationship is the brand. You either trust your advisor to have the tools—table stakes in our opinion—or you don’t,” Kirby said. “We have evolved our practice over time to improve the depth and breadth of how we can help clients. Our launch to complete independence allows us to focus entirely on our clients’ best interest, with an ability to offer access to a wide range of non-proprietary products and leverage [LPL’s integrated technology](#), which improves our access to information, planning and performance reporting to create an enhanced client experience.”

Why Talisman Wealth Advisors chose LPL

The advisors believe the new partnership with LPL empowers their independence. “The LPL platform provides us access to back-office support, industry-leading resources, economies of scale, and best practices from a group of subject experts in the full range of disciplines related to wealth management who share our passion for serving our clients,” Granizo said, also noting the team appreciates LPL’s commitment to the RIA space. “LPL is very forward-thinking and has the technology, platform of support and services, reputation and stability to support us well into the future as the industry continues to evolve.”

Scott Posner, LPL executive vice president, Business Development, said, “We are honored that Jennifer and Frank chose to partner with LPL in the launch of their new RIA and welcome them to the LPL community. We are a leading partner to advisors by meeting them where they are in the evolution of their practices. As the marketplace continues to shift, we understand the need to provide flexibility and choice for advisors to model their practice and serve their clients as they see fit. As a leading custodian and partner to advisors, we are staunchly committed to delivering the best set of solutions and experiences designed to help advisors like Jennifer and Frank be successful in serving the needs of their clients. We look forward to supporting Talisman Wealth Advisors 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 18,000 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.

LPL Financial LLC, an SEC- registered broker-dealer and investment advisor. Member FINRA/SIPC.

We routinely disclose information that may be important to shareholders in the “Investor Relations” or “Press Releases” section of our website.

Talisman Wealth Advisors and LPL Financial are separate entities.