LPL Financial

LPL Financial Welcomes Benchmark Financial Services

Jun 1, 2021

CHARLOTTE, N.C. – June 1, 2021 – LPL Financial LLC today announced that financial advisor Ashley Dusek CFP® and the team at Benchmark Financial Services have joined LPL Financial's broker-dealer, corporate registered investment advisor (RIA) and custodial platforms. They have aligned with Financial Advocates, an existing LPL firm that provides concierge-level services to independent advisors. Dusek and team reported having served approximately $150 million in advisory, brokerage and retirement plan assets*. They join from Avantax Investment Services, part of Blucora.

Based in Longview, Texas, the Benchmark team offers full service wealth management and financial advice focused on tax implications. Dusek, managing partner, is joined by advisors John Cotten, Alan Goodman, Randy Monk and John Ussery, all who have backgrounds in accounting. The team maintains deep ties within its community, serving local business owners, families and individuals.

Why the Benchmark team chose LPL

"We chose to move to LPL Financial to enhance our client experience and create more efficiencies in our office," Dusek said. "LPL offers advanced technology and innovative resources that will allow us to spend more time with clients and run more sophisticated scenarios for them. Financial Advocates provides an additional layer of personalized services that will help us really thrive in the work we do on behalf of our clients."

Scott Posner, LPL executive vice president, Business Development, stated, "We extend a warm welcome to Ashley, Alan, Randy, John and John, and congratulate Financial Advocates on growing its advisor community. As a partner with scale, we will continue to invest in capabilities and solutions designed to help advisors differentiate their businesses, bring added value to their clients and win in their markets. We look forward to a long-lasting relationship with both Financial Advocates and the Benchmark team."

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 Kehrer 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. Tax services are not provided 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.

Benchmark Financial Services, Financial Advocates and LPL Financial are separate entities.