



LPL Financial and Gladstone Wealth Partners Welcome Veritas Capital Management

Jul 7, 2021

CHARLOTTE, N.C. – July 7, 2021 – [LPL Financial LLC](#) announced today that financial advisor Joseph F. Myer CFP®, CPFA has joined LPL Financial's broker-dealer, corporate registered investment advisor (RIA) and custodial platforms. He is aligned with Gladstone Wealth Partners, a large enterprise supporting LPL-affiliated advisors. Myer reported having served approximately \$250 million in advisory, brokerage and retirement plan assets*, and joins LPL from Merrill Lynch.

Based in Ashburn, Va., Myer has built a client-centric practice where he aspires to be part of his clients' "Top 5," along with their doctor, accountant, lawyer and spiritual guide. He works closely with a diverse client base of business owners, executives and retirees, starting every account with financial planning before shifting ongoing focus to wealth management and investment portfolios. He is joined by Teresa Gentry, director of client experience.

After spending the first two decades of his career at Wall Street firms, Myer chose to move to LPL and Gladstone to launch his new independent practice, Veritas Capital Management, LLC. "In Latin, veritas means 'truth' and that is our guiding light as advisors—to communicate with honesty, seek the truth and be guided by the truth," Myer said.

As he embarks on a new chapter in his career, Myer looks forward to the freedom that comes with running an independent practice. "I want to have my own voice and be able to freely express my views, in terms of the market and economy, as well as with products and developments in my practice," Myer said. "With this move, I am able to serve my clients as I see fit while leveraging the robust resources and innovative capabilities provided by LPL and the boutique service from my partners at Gladstone."

Myer is already eying future expansion to his team. He joined Gladstone's partner model, which supports growth through acquisition or building out the office by adding turnkey advisors to the practice. "We hope to find just the right fit to grow out the team—advisors who share our standards and would complement how we do business," Myer said.

Outside of work, Myer is deeply committed to supporting his community through leadership and volunteer roles. He currently serves on the board of directors for the Clarke County Sanitary Authority and the finance council of his church, St. Bridget of Ireland Catholic Church. He is also a past president of the Clarke County Education Foundation and the Rotary Club of Frederick County, and also served as co-chairman of the United Way Day of Caring.

Robert Hudson, founder and chairman of Gladstone Wealth Partners, said, "It has been a pleasure getting to know Joe over the past few months. It's clear that he has built an incredible business throughout his career by developing deep personal relationships with his clients. The entire Gladstone team looks forward to supporting Joe's next steps as he builds out his independent enterprise. This is yet another example of a large well-respected wirehouse advisor choosing the independent space, and I expect this trend to continue in the years to come."

"We extend a warm welcome to Joe and are honored to support his journey to independence," said Scott Posner, LPL executive vice president, Business Development. "Independence is a thread that runs through everything we do at LPL. Whatever an advisor's vision is for their practice, we are committed to supporting them by offering differentiated service experiences, integrated technology and innovative business resources designed to help them pursue the freedom and rewards that come with building their own business. We congratulate Gladstone on its continued growth and look forward to supporting both Gladstone and Veritas Capital Management for many 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 (2020-2021 Kehler Bielan Research & Consulting Annual TPM Report; Fortune 500 as of June 2021)

*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.

Veritas Capital Management, Gladstone Wealth Partners, and LPL Financial are separate entities.