



LPL Financial Welcomes Financial Advisors Kyle Smith and Michael Sandlin

Jul 28, 2021

CHARLOTTE, N.C. – July 28, 2021 – [LPL Financial LLC](#) today announced that financial advisors Kyle Smith CFP® and Michael Sandlin CFP®, AAMS have joined LPL, affiliating with Linsco by LPL Financial, the firm's employee advisor model. Smith and Sandlin reported having served approximately \$740 million in advisory, brokerage and retirement plan assets*. They join LPL from Truist Investment Services, formerly BB&T Scott & Stringfellow, and will be the anchor tenants for a new Linsco office in Raleigh, N.C.

Smith and Sandlin are committed to providing their clients with personalized, comprehensive financial plans that address retirement income planning, tax strategies and estate planning, often coordinating with CPAs and attorneys as part of the process. They are joined by office support members Hollie Katz, Julie Roach and Ashley Reid.

The advisors are longtime colleagues and friends who spent many long nights studying for their Certified Financial Planner exam together. They recognized they share a similar approach to serving clients, so they entered into an official partnership in 2019 to ensure business continuity and better position their practice for future growth.

Why Kyle Smith and Michael Sandlin chose LPL

Smith and Sandlin strongly believe that as financial advisors, they should be fiduciaries and put clients' interests ahead of their own, which is why they joined Linsco to launch SmithSandlin Wealth Planning. "We truly believe LPL is aligned with our culture and desire to put clients first," Smith said. "LPL is an industry leader with great resources, but they don't overstep boundaries or pass down corporate mandates. They empower us to do our jobs as financial advisors and are there to support us with the tools we need to spend more time with our clients."

The [Linsco employee model](#) offers "the best of both worlds," they said, giving them brand autonomy and the freedom to own their book of business while also receiving comprehensive turnkey support and stability from LPL. "We both have a desire to focus on our clients and didn't want to be distracted by real estate or human resources functions. We searched for the best wealth management platform in the industry, and we believe we found that with LPL. Our clients will benefit from a differentiated service experience thanks to the firm's hands-on support teams," Sandlin said.

New office for future Linsco advisors

With the launch of SmithSandlin Wealth Planning, LPL is also opening a new office in Raleigh that will have space for several additional Linsco advisors and their teams. "As the anchor tenants and first stakeholders, we are excited that we can help shape the culture within the new office," Smith said. "We want to build an environment where we can support each other, share ideas and create a sense of community."

Outside of work, both Smith and Sandlin are active in their community and believe in the importance of giving back. Sandlin is a past board member of the Raleigh Kiwanis Foundation, a past president of the Wake County chapter of the ECU Educational Foundation and a volunteer leader for the Boy Scouts of America. Smith is a past president of the Cary-Kildaire Rotary Club and a member of the Paul Harris Society for District 7710. He is also a youth counselor for his church, First United Methodist Church of Cary, and has actively participated in several mission trips.

Scott Posner, LPL executive vice president, Business Development, said, "We congratulate Kyle and Mike on the launch of their new practice and are honored to welcome them to the LPL family. We couldn't have hand-picked a more perfect team to serve as the anchor tenant for our new Linsco office in the Raleigh area. These advisors care deeply about putting their clients' needs first, and we believe they should be able to run their practice on their own terms. We are committed to supporting Kyle and Mike, along with all of our advisors, with innovative solutions and integrated capabilities designed to help them create differentiated experiences for clients and build their business with long-term value in mind. We look forward to a long-lasting relationship with the entire team at SmithSandlin Wealth Planning, as well as welcoming future advisors to the new Raleigh office."

Related

[Inside the Linsco by LPL Financial model](#)

Learn more about [SmithSandlin Wealth Planning](#). 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); 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.*

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