



LPL Financial Welcomes White Oak Investment Management

Dec 14, 2020

CHARLOTTE, N.C. – Dec. 14, 2020 – [LPL Financial LLC](#), a leading retail investment advisory firm, independent broker-dealer and registered investment advisor (RIA) custodian, today announced that financial advisors Lynn Daughtry and Kyle Conger have joined LPL Financial's broker-dealer and corporate RIA platforms, leveraging LPL as custodian. The advisors reported having served approximately \$215 million in advisory and brokerage assets*. They join LPL from Wells Fargo Advisors.

The advisors recently launched their independent practice, White Oak Investment Management, in Thomasville, Ga., where they work closely with retirees, families and individuals to provide personalized investment services. The pair of advisors met at a conference and quickly struck up a friendship, which led to their official business partnership last year as they worked to build a stronger business continuity plan. "We complement each other with our different strengths and areas of expertise," Daughtry said.

Freedom to provide more choices

They also share a passion and commitment for always doing the right thing for their clients. That mindset prompted their move to LPL Financial. "LPL offers freedom to provide more choices for our clients' individual goals and needs, as well as the independence to serve their best interests. That's really what it all boils down to," Conger said. "And on top of that, LPL has wonderful, integrated technology and a sophisticated wealth management platform that will help us elevate our business and enhance the client experience."

Both advisors have deep ties to their local community. Conger, a father of four, coaches youth sports and is also on the board of directors for a Christian radio station. Daughtry, a Thomasville native, is active in her church, where she teaches 2-year-old Sunday School and sings in the choir. She also enjoys spending time with her five grandchildren.

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We extend a warm welcome to Lynn and Kyle and congratulate them on the launch of their independent business. It is important for financial advisors to create thoughtful business continuity plans, and we applaud the steps this team is taking to ensure continuous care for their clients. We are also committed to being a long-term partner to clients, and our platform and support model is designed to continuously evolve to be able to help advisors create value with clients and build value in their business at all stages of their business' lifecycle. We look forward to a long-lasting partnership with White Oak Investment Management."

Read about other firms that recently joined LPL in the [LPL Financial News and Media section](#) of LPL.com.

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About LPL Financial

[LPL Financial](#) is a leader in the retail financial advice market, the nation's largest independent broker-dealer** and a leading custodian (or provider of custodial services) to RIAs. We serve independent financial advisors, professionals and financial institutions, providing them with the technology, research, clearing and compliance services, and practice management programs they need to create and grow thriving practices. LPL enables them to provide objective guidance to millions of American families seeking wealth management, retirement planning, financial planning and asset management solutions.

*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.

**Based on total revenues, *Financial Planning* magazine June 1996-2020.

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.

White Oak Investment Management and LPL Financial are separate entities.