LPL Financial and INC Advisors Welcome Trilith Wealth Management

Nov 3, 2020

CHARLOTTE, N.C. – Nov. 3, 2020 – LPL Financial LLC, a leading retail investment advisory firm, independent broker-dealer and registered investment advisor (RIA) custodian, today announced that Louis Pelliccioni , Brice L. Pelliccioni, C(k)P®, CDFA®, and Amanda Pelliccioni have joined LPL Financial's broker-dealer and corporate RIA platforms, leveraging LPL as custodian. The family team is aligned with Independent Network of Consultants & Advisors (INC Advisors), a large enterprise on LPL's corporate RIA platform. The Pelliccionis reported having served approximately $200 million in advisory, retirement plan and brokerage assets*. They join LPL from Wells Fargo Advisors.

Longtime financial advisor Lou Pelliccioni founded the business in 1985. Brice and Amanda, Lou's son and daughter-in-law, joined the practice within the last few years after making career changes from the medical field. As parents to a newborn daughter, they believe the financial services industry allows them to set their own hours, creating a better work-life balance. With the recent transition to INC Advisors and LPL, Pelliccioni Financial Consulting Group has been rebranded to Trilith Wealth Management. Inspired by the ancient trilithon, the new name means steadfast, strong and supportive.

Lou said he is excited to launch a new independent practice to service clients from their offices in both Morgantown, W. Va., and Naples, Fla. They will continue to provide personalized comprehensive investment advice and financial planning as they work toward plans to expand their offerings in the near future. "After 35 years, it became clear to me that independence was the right choice for our business, and more importantly for our clients," Lou said. "Entrepreneurship has always been extremely important to me, and the independent model brings us back to a place where the decisions impacting our business are being made locally, with the clients' interests as the main driver. LPL's fully integrated platform allows us to solve for a wider range of client needs, thanks to its innovative technology coupled with the ability to customize to each client's unique goals."

Evolving with LPL Financial and INC Advisors

Having built a successful practice, largely through referrals, the team is ready to take the business to the next level. The new partnership with LPL and INC Advisors is part of the firm's plans to evolve and build out a family office concept that they've been working toward for years. "We are beginning this new chapter in our practice with the end in mind, which requires substantial forward-looking thinking in order to plan for long-term goals. We do the same thing for our clients when we plan for their financial goals. The future of advice is changing drastically, and we want to implement a multi-professional approach to include everything from property casualty insurance to tax planning to specialized retirement planning," said Brice, who will complete his Master's in Taxation this year.

Christopher Seebeck, senior vice president, INC Advisors Business Development, added, "I believe advisors have a responsibility to themselves and their clients to take a close look at the independent channel. As the industry continues to evolve, our model has become an ideal choice for advisors, especially those looking for flexibility and control in planning for the succession of their practice. Our model truly delivers on the industry's promise to advisors of ownership and entrepreneurship. We look forward to helping Trilith Wealth evolve their practice and expand in the Florida and West Virginia markets."

Richard Dragotta, founder of INC Advisors, said, "INC Advisors is delighted to welcome the Pelliccionis to our family and network of independent advisors. It is always exciting to help an advisor move to our independent model. We offer unified independence, flexibility and control, making business fun again. With the turnkey infrastructure and economies of scale and experience we provide, coupled with LPL Financial' s integrated technology and product offering, successful advisors like the Pelliccionis are positioned to be able to grow and compete for decades to come."

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We extend a warm welcome to Lou, Brice and Amanda, and we congratulate INC Advisors on the growth of their support model. We all share a goal to bring value to our clients and be their long-term partner. At LPL, we do that by having a laser focus on the client experience and by making ongoing investments in a comprehensive wealth management platform that helps advisors across the lifecycle of their business. We look forward to supporting the Trilith Wealth Management today and meeting them every step of the way of where they want to go."

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 is a leader in the retail financial advice market and the nation's largest independent broker-dealer**. 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.

Securities and advisory services offered through LPL Financial, a registered investment advisor. Member FINRA / SIPC.

Trilith Wealth, Independent Network of Consultants & Advisors (INC. Advisors) and LPL Financial are separate entities.

*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

Throughout this communication, the terms “financial advisors” and “advisors” include registered representatives and/or investment adviser representatives affiliated with LPL Financial LLC, an SEC registered broker-dealer and investment advisor