LPL Financial Welcomes Stabler Wealth Management

Aug 17, 2020

CHARLOTTE, N.C. – Aug 17, 2020 – LPL Financial LLC, a leading retail investment advisory firm, independent broker-dealer and registered investment advisor (RIA) custodian, today announced that financial advisors Todd Stabler MBA and Dave Mantell CFP®, CFA, have joined LPL Financial's broker-dealer and corporate registered investment advisor (RIA) platforms, leveraging LPL as custodian. The advisors reported having served approximately $300 million in brokerage and advisory assets*. They join from KMS Financial Services, part of the Advisor Group network of broker-dealers.

Stabler founded the firm in 1989 in his hometown of Bellevue, Washington. Mantell partnered with Stabler, a longtime family friend, in 2017 providing long term continuity to their clients. Mantell joined from BlackRock, where he was a vice president of a portfolio management team. They are a family-oriented firm supported by a long tenured team of four staff members. Using a team approach, the group specializes in helping clients thrive in retirement by providing full-service, personalized financial planning with an emphasis on tax and estate planning strategies.

LPL's stability & technology attracted Stabler

The team was drawn to LPL Financial for its stability and innovative technology platform. "We appreciate that everything in ClientWorks is integrated and simplified. Our clients can log on to view their accounts or tax returns and even upload a document, all in one place," Mantell said. "In the past, our team spent so much time and energy looking for one-off technology offerings to bundle together. But LPL's turnkey offering and integration really boosts our technology experience and helps us manage our business as we see fit."

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We welcome Todd, Dave and the entire Stabler Wealth Management team to LPL. We are committed to investing in innovative capabilities and tools that can help advisors differentiate their practice and increase their value to clients. Technology plays an integral role in our advisors' practices, and we do more than just deliver leading tools. LPL uses innovation to integrate workflows and design a better user experience so advisors have greater capacity, more ease and the resources to be able to deliver more value to their clients. We will always strive to meet advisors where they are in their businesses, with technology and resources that enable them to be successful however they envision for themselves, their firm and their clients. Our team looks forward to a long-lasting partnership with Stabler Wealth Management."

Read about other firms that recently joined LPL in the LPL Financial News and Media section of LPL.com.

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.

Stabler Wealth Management and LPL 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 adviser.