LPL Financial

LPL Financial and Gladstone Wealth Partners Welcome Financial Advisor Keith Boyd

Jul 27, 2020

CHARLOTTE, N.C. – July 27, 2020 – LPL Financial LLC, a leading retail investment advisory firm, independent broker-dealer and registered investment advisor (RIA) custodian, today announced that financial advisor Keith Boyd CFP® has joined LPL Financial's broker-dealer and hybrid registered investment advisor (RIA) platforms, leveraging LPL as custodian. He has also aligned with Gladstone Wealth Partners, a large enterprise on LPL's hybrid RIA platform. Boyd reported having served approximately $180 million in brokerage and advisory assets*. He joins from Wells Fargo Wealth Brokerage Service.

Why he chose LPL

After 24 years working at a bank branch, Boyd reflected on his career and came to the conclusion that it was time for a change. "In my quest to live a more holistic life, I knew it was in my clients' best interest to take more control over my business and operate as a fiduciary in an independent practice," said Boyd, who specializes in solutions-based planning and comprehensive wealth management. "For 25 years in a row, LPL has been an industry leader, offering the independence and freedom to serve client needs without any red tape or proprietary products. It is a reputable, national firm that I am proud to partner with."

Boyd, a father of two boys and a marathon runner, said it's equally exciting to partner with Gladstone, a boutique wealth management firm that provides business support and financial solutions to its network of financial advisors. Boyd is leveraging the Gladstone name for his firm, and has opened an office in Flemington, N.J., which he shares with an established Gladstone accounting practice. The new partnership and office site provide him access to more clients as he seeks to expand his business.

Robert Hudson, managing partner and founder of Gladstone, said, "We are honored that Keith chose to leverage our Partnership model to build his independent business. His impeccable reputation and industry knowledge are exactly what our firm looks for in advisors. We are passionate about the success of our partners and he will get the best of what Gladstone has to offer to help him grow his firm. With our LPL affiliation and the ability to scale and grow our businesses, it is a very exciting time to be independent."

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "On behalf of LPL, we extend a warm welcome to Keith and congratulate him on launching his independent practice. With the support of the Gladstone along with the backing of LPL's robust technology and wealth management platforms, we are pleased Keith found the right combination of support and resources that will benefit his business and his clients. We look forward to supporting Keith's vision for the future of his business, and we congratulate Gladstone on growing its network of quality advisors."

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.

*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