



LPL Financial Welcomes Ridgeline Wealth Management

Jul 1, 2020

CHARLOTTE, N.C. – July 1, 2020 – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that Ridgeline Wealth Management has joined LPL Financial’s broker-dealer and corporate registered investment advisor (RIA) custodial platforms. The team reported having served approximately \$210 million in brokerage and advisory assets*. They join from Wells Fargo Advisors Financial Network.

Financial advisors Jake Lavelly and Robert Dimick partnered in 2005 to take an integrated approach to addressing their clients’ complex financial needs. They went independent in 2011, launching Ridgeline Wealth Management in St. Johnsbury, Vt. The team has grown over the years to include fellow partner advisor Tyler Cahoon, associate wealth manager Elysia Gingue, operations manager Stacey Randall and administrative assistant Jolene Brennan. “We have a really diverse, young team that positions us to serve our clients for the long haul,” Lavelly said.

Ridgeline’s financial advisors take a risk-based approach to asset allocation and portfolio management. They consider it a priority to keep their clients well-informed throughout their financial journey, incorporating multiple client interactions, reviews and touch points. “Our clients always know when they’re going to hear from us. They know our goals and approach, and they know what to expect,” Dimick said.

Innovative Technology and Enhanced Services

The team turned to LPL seeking more transparent fee-structures, [innovative technology](#) and [enhanced service](#). “LPL’s intuitive and integrated technology platform is simple and easy to use. It will allow us to spend more time doing what we want to be doing, which is working hand-in-hand with clients,” Lavelly said. “Also, we believe the service and advisor-centric culture at LPL is truly exceptional. We’re able to reach out to a dedicated professional to receive customized support any time we need it. We’ve found that we really like the people we’ve met at LPL; they’ve meshed well with us and we feel right at home.”

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, “We welcome the Ridgeline Wealth Management team to LPL, a team that recognizes the benefits of size and scale in operating an efficient practice and providing access to robust resources. More so, they’ve experienced first-hand that size doesn’t mean that our advisors have to compromise the personalized service and support that will help them be successful advisors and business owners. Our entire mission is to support our clients and make it easier for them to stay focused on what they do best, which is helping their clients. We look forward to supporting the Ridgeline team for many years to come.”

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 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.

Ridgeline Wealth Management 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 1996-2019

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.