



## LPL Financial Welcomes Hege Financial Group

Nov 6, 2019

**CHARLOTTE, N.C. – Nov. 6, 2019** – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that Hege Financial Group has joined LPL Financial’s broker-dealer and corporate registered investment advisor (RIA) platforms. The advisors reported having served approximately \$275 million in brokerage and advisory assets\*. They join from Lincoln Financial Securities.

The growing firm in Winston-Salem, N.C. was founded in 1979 by longtime financial advisor Ed Hege. He is joined by his son, Will Hege, president, and fellow advisors Bill Gribble, Perry Hudspeth and Steven Rubin, as well as two office support staff. They provide financial planning and holistic investment advice, working closely with partner CPA firms and attorneys as needed. “We look at ourselves as the quarterback of our clients’ entire financial planning needs,” Will Hege said. “Our clients’ interests always come first. We are intentional about building lasting relationships with a high level of customer service and aim to positively impact each client’s financial future.”

### LPL’s Independent Business Model & Technology Solutions

The team moved to LPL Financial seeking an independent business model and technology solutions that can “keep pace with industry trends,” Hege said. “With LPL Financial, we’re able to put our clients’ needs first and offer truly objective financial advice. And LPL’s ability to continually invest in its technology platform will allow us to enhance the client experience through a combination of our advice and digital capabilities.”

Will Hege said he also believes LPL is the right choice because of the firm’s available resources and support for exit planning and acquisitions. Hege is working through a long term, thoughtful succession plan with some of the advisors in their group. “It’s been a phenomenal opportunity to work alongside my father for 16 years. One of the greatest joys is knowing I will be able to continue his legacy and finish many of the plans he started,” Hege said. “My father and I will continue to work closely together in this next chapter with LPL, taking a team approach to all client relationships.”

“We welcome the Hege Financial Group team to LPL,” said Rich Steinmeier, LPL Financial managing director and divisional president, Business Development. “We serve as a partner to our advisors by delivering the resources, solutions and technology that can help them be successful at every stage of their business’ lifecycle, whether that is growing their firm, planning their succession or helping them monetize their practice. We leverage our scale to bring value to advisors, by helping them to cost effectively manage their practices and by investing in innovative capabilities that can help them address the evolving needs of their businesses and their clients. We look forward to being a partner to Hege Financial Group for many years to come.”

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

Advisors, learn how to take a [proactive approach in the progression](#) and future planning of your firm.

### **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 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.

Hege Financial Group 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