LPL Financial Welcomes SecondHalf Coach Wealth Management

Oct 3, 2019

CHARLOTTE, N.C. – Oct. 3, 2019 – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that three financial advisors with SecondHalf Coach Wealth Management have joined LPL Financial's broker-dealer and corporate registered investment advisor (RIA) platforms. They reported having served approximately $210 million in brokerage, advisory and retirement plan assets*. They join from SagePoint Financial.

The Latrobe, Penn.-based group was formed when longtime financial advisors Bill Urbanik and Tony Slezak merged their practices in 2010. They brought on a third financial advisor, Jessica Marazza, a short time later. All three are managing partners and owners, and they have operational support from four assistants. The advisors, who are in their early 30s, 40s and 50s, believe their business continuity plan positions them to serve their clients' needs for years to come.

The team, Urbanik said, was impressed with LPL's technology, resources and solutions. "We wanted integrated technology that would improve the operational efficiency of our day-to-day work, and we can manage all those tasks with LPL's ClientWorks Connected. We can also do trading, change an address or create a model all from one platform."

The group is transitioning a significant portion of their managed book to Advisor Sleeve, a new investment solution within LPL's Model Wealth Portfolios platform that helps make money management easier by providing advisors with the ability to act as strategists while outsourcing to LPL tasks such as trading and rebalancing. "We're very hands on, from the client relationship and money management standpoint, and we appreciate that this gives us the flexibility to manage just a portion of the portfolio or the entire thing. If we want to utilize expertise from a third party, we can do that, too. It just makes sense."

Urbanik, a nationally credited soccer coach and licensed hockey coach, said their firm's name, SecondHalf Coach Wealth Management, refers to their clients who are typically in the second half of their lives. "Our clients are hard-working people who saved well and are looking for some financial guidance through the retirement years. We view ourselves as a coach at their side as they navigate the complexities of investing and financial planning."

The SecondHalf team also founded the nonprofit Go2Goal and its "Goal Magazine" to promote other entrepreneurs, connecting professionals from various fields to members of the local community.

"We welcome Bill, Jessica and Tony to LPL and are proud to support their practice," said Rich Steinmeier, LPL Financial managing director and divisional president, Business Development. "With the increasing demand for financial advice from an independent advisor, advisors are seeking greater efficiency in their practices to be able to serve more clients and focus their time where they can bring the most value. By investing in solutions such as Advisor Sleeve and the integrated capabilities of ClientWorks Connected, we strive to help advisors gain more capacity through outsourcing and automation. We look forward to being a partner to SecondHalf Coach Wealth Management 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.

SecondHalf Coach Wealth Management and LPL Financial are separate entities. Go2Goal is not affiliated with, nor endorsed by, LPL Financial.

*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