LPL Financial Welcomes Financial Advisor Joshua Lambert

Oct 1, 2019

CHARLOTTE, N.C. – Oct. 1, 2019 – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that financial advisor Joshua Lambert has joined LPL Financial's broker-dealer and corporate registered investment advisor (RIA) platforms. He reported having served approximately $130 million in brokerage and advisory assets*. He joins from Ameriprise Financial.

Delivering personalized, client-centered financial advice is part of the Lambert family legacy. His father, John, started Lambert Investment Group in 1984, and Joshua joined the business 15 years ago. Father and son worked together through a thoughtful transition until 2012, when Joshua took over his father's client base, consisting mostly of middle class workers, small business owners and retirees in their hometown of Mount Vernon, Ohio, northeast of Columbus.

Lambert moved to LPL Financial seeking a more independent business model and lower fee structures. "In our small town, I run into clients every day. I love that I can represent the financial industry throughout my client interactions, both inside and out of the office. LPL provides access to the comprehensive support, resources and products that give advisors like me the autonomy to run a business with flexibility and freedom."

Lambert, a father of two daughters and husband to a nurse practitioner, said the independent model also allows him more flexibility to be there for his family. He will continue to grow his practice organically through referrals, with an overall goal to build long-term relationships with clients by providing personalized advice. "I've always felt like financial advisors hold the keys to helping clients find financial stability. Anyone can purchase a mutual fund on their own. But I like helping my clients feel more confident with their decision, knowing it's guided by a trusted and knowledgeable financial advisor."

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We welcome Joshua to the LPL family and are proud to support his independent practice. Our advisors are our main focus, and we serve to empower them in the work they do. We will continue to use our size and scale to create value for our advisors, including making investments in the technology, resources and innovative capabilities that can help them be more successful by serving their clients efficiently and effectively."

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

Advisors, find a recruiter near you.

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.

Lambert Investment 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