LPL Financial Welcomes Triton Financial Planning Group

Feb 20, 2020

CHARLOTTE, N.C. – Feb. 20, 2020 – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that financial advisors Jim M. Freisen CFP®, CPA and Jordan Celkupa CFP® have joined LPL Financial's broker-dealer and corporate registered investment advisor (RIA) platforms. They reported having served approximately $155 million in brokerage and advisory assets*. They join from Sagepoint Financial, part of the Advisor Group network of broker-dealers.

After 20 years managing accounting for mutual fund companies, Freisen shifted his career focus to the advice side of the business, providing financial planning and investment management services through his firm, Triton Financial Planning Group in Red Bank, N.J. He teamed up with Celkupa about 10 years ago, and their office also includes a tax specialist and an operations manager.

"Most of our clients come in ready to retire. Our job is to create a financial plan with them that will help them work toward their goals of a successful retirement," Freisen said, noting that the team's extensive tax knowledge plays a valuable role in addressing their clients' holistic financial picture. "Our goal is to create meaningful relationships with clients in order to provide comprehensive planning and financial advice that is in their best interest."

Why Triton Chose LPL

Freisen cited the service experience as a key reason they chose LPL, noting both human and digital aspects. "LPL's service is tremendous. We're able to reach out to dedicated service professionals any time we need support," he said. "We are also impressed with LPL's technology ecosystem, which is so critical to our day-to-day work and a big part of how we get value from LPL. I've found that opening accounts, transferring money and uploading documents in ClientWorks is easy and user-friendly. And we absolutely love that eSignature is integrated throughout the entire system, making it quick and easy for our clients to sign documents."

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We welcome Jim and Jordan to LPL. Our entire focus is to support advisors and solve for the problems they face in their businesses, making it easier for them to stay focused on what they do best, which is helping their clients. We are committed to investing in capabilities and technology solutions that help advisors save time so they can continue building quality relationships and grow their practice. We look forward to a long partnership with Triton Financial Planning Group."

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 1996-2019