



LPL Financial Welcomes Athens Federal Community Bank

Dec 13, 2018

CHARLOTTE, N.C. – Dec. 13, 2018 – [LPL Financial LLC](#), a leading retail investment advisory firm and independent broker-dealer, today announced that Athens Federal Community Bank (Athens Federal) has joined LPL Financial's broker-dealer and corporate registered investment advisor platforms. Athens Federal reported that its investment program served approximately \$150 million of client brokerage and advisory assets*.

Athens Federal was recently acquired by CapStar Bank, which offers investment services through LPL Financial and utilizes support from LPL Financial client Financial Resources Group Investment Services (FRG). With the acquisition, financial advisor Fred Burke chose to become affiliated with LPL Financial and continue serving the bank's clients at CapStar. Athens Federal's investment program had been affiliated with Raymond James.

"We welcome Fred to CapStar Wealth Management and thank him for his commitment to his clients," said Tara Alford, CapStar executive vice president and program manager. "With CapStar, FRG and LPL behind him, he'll have resources and support to enhance the guidance he can provide to clients and help them work toward growing their assets."

Burke said, "My clients always come first, and I'm looking forward to continuing to serve them with the support of CapStar's team and the bank's relationship with LPL and FRG. LPL's scale offers access to products, resources and technology that will help me address my clients' needs. I believe this is the right decision for me and for our clients."

The Athens, Tenn.-based bank becomes CapStar Wealth Management's sixth branch location, including others in Nashville and the surrounding region.

Craig Kamis, LPL Financial executive vice president, Institutional Business Development, said, "We've had a great relationship with FRG and CapStar for many years, and we congratulate them on welcoming Fred to their team. As a leader in this space, we are able to provide the expertise, resources and support that helps advisors differentiate themselves. We're proud he saw benefits in affiliating with LPL. We will continue to invest in the technology and innovative solutions that will help CapStar and its advisors grow."

More information about CapStar Wealth Management can be found on their website at CapStarBank.com.

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

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. Insurance products offered through LPL Financial or its licensed affiliates.

The investment products sold through LPL Financial are not insured CapStar/Athens Federal deposits and are not FDIC insured. These products are not obligations of CapStar/Athens Federal and are not endorsed, recommended or guaranteed by CapStar/Athens Federal or any government agency. The value of the investment may fluctuate, the return on the investment is not guaranteed, and loss of principal is possible.

*Based on prior business and represents assets that would have been custodied at LPL Financial, rather than third-party custodians. Reported assets have not been independently and fully verified by LPL Financial.

**Based on total revenues, *Financial Planning* magazine June 1996-2018

LPL Financial, CapStar Bank, CapStar Wealth Management, Athens Federal and FRG Investment Services are separate entities.