LPL Financial

LPL Financial and Good Life Financial Advisors Welcome Arrow & Bow Wealth Advisors

Nov 1, 2018

CHARLOTTE, N.C. – Nov. 1, 2018 – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that Arrow & Bow Wealth Advisors has joined LPL's broker-dealer platform and aligned with Good Life Financial Advisors, an independent advisory firm on LPL's hybrid registered investment advisor (RIA) platform. Arrow & Bow reported that its advisors served approximately $110 million of client brokerage and advisory assets as of Aug. 17, 2018*.

Arrow & Bow was founded this summer by financial advisor Elizabeth Leventis and her husband, Jason Leventis, who serves as operations manager. The firm is rounded out by experienced wealth advisors Scott Ingold and Deena Wilson, along with a team of client service professionals. All the advisors were formerly with Foresters Financial Services. Based in the Charlotte area, the Arrow & Bow team takes a disciplined, client-centric approach to wealth management by focusing on three core values: education, simplicity and collaboration. "We believe our role as advisors is to develop a comprehensive plan and perform due diligence on the back end, while ensuring the client experience is simplified and easy to understand. Then we collaborate with clients to prioritize plans and financial strategies," said Elizabeth Leventis. "LPL's capabilities and infrastructure lay a strong foundation for us to deliver on our client-first approach. The firm's tools and technology make it easier for us to manage our practice, which allows us more time to focus on our clients."

"We're excited about the addition of Arrow & Bow to the Good Life team," said Courtnie Nein, Good Life co-founder and president. "We share an entrepreneurial mindset, as well as a passion for helping clients increase their personal and financial health. We look forward to the opportunity for our firms to grow together."

"On behalf of the LPL family, we congratulate Elizabeth and team for launching their independent firm and thank them for choosing us to be their enabling partner," said Rich Steinmeier, LPL Financial managing director and divisional president, Business Development. "We are proud to be able to leverage our financial strength to make ongoing investments in technology and resources that deliver value to our advisors and support their growth. We also congratulate Good Life on growing their community of advisors and playing a role to empower the Arrow & Bow team. We look forward to a partnering with the two firms for many years to come."

For more information about Arrow & Bow Wealth Advisors, visit www.ArrowBowWealth.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.

*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, Arrow & Bow Wealth Advisors and Good Life Advisors are separate entities.