LPL Financial

LPL Financial Welcomes Winebrenner Financial Services

Oct 16, 2018

CHARLOTTE, N.C. – Oct. 16, 2018 – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that Winebrenner Financial Services has joined LPL's broker-dealer and corporate registered investment advisor (RIA) platforms. The firm reported that it served approximately $180 million of client brokerage and advisory assets as of July 27, 2018*. Winebrenner Financial joins LPL from Cetera.

Financial advisor David Winebrenner Jr. established the Lebanon, Ken.-based firm in 2001, building the business mainly through referrals. With the help of three office support members, Winebrenner, who has a background in insurance and risk management, offers a holistic approach to asset management by creating tailored strategies guided by each client's financial goals. His client base consists mostly of business owners, farmers and manufacturing employees. He helps them work toward long-term goals by building and protecting wealth.

"We chose LPL because its size and scale helps us keep costs low, so we can deliver additional value and choice to our clients," Winebrenner said. "We are also very impressed with the technology. We believe the capabilities we now have access to can accelerate our growth. We're really excited about our future and deepening the client relationships in our community."

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.

*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 and Winebrenner Financial Services are separate entities.