



LPL Financial Welcomes Ice Capital Management

Aug 9, 2021

CHARLOTTE, N.C. – Aug. 9, 2021 – [LPL Financial LLC](#) announced today that financial advisor Everett Ice CFP® and the team at Ice Capital Management have joined LPL Financial's broker-dealer, corporate registered investment advisor (RIA) and custodial platforms. The team reported having served approximately \$135 million in advisory, brokerage and retirement plan assets*. They join LPL from Wells Fargo Advisors Financial Network.

Based in Cameron, Mo., Ice works closely with his broad client base as well as their attorneys and accountants to provide comprehensive financial advice and structured financial planning. Ice, who started investing on his own as teenager, will celebrate 20 years as a financial advisor this fall. He admits his journey into the financial services industry was rather unique. He joined the Army out of high school and served two year active duty and six years reserve, including activation during Desert Storm. At the University of Missouri, he earned a bachelor's degree in animal science and went on to work in the agricultural industry for several years. But in 2001, he recognized the need for a career change in order to best support his growing family.

Now at Ice Capital Management, he's joined by his wife Pam, who is a partner in the business, as well as a full-time office support staff member. "Ice Capital Management is a family-run business, so we treat our clients like our own family," Ice said. "We aspire to connect all the pieces for our clients, helping them organize and structure their financial needs, whether that's saving for retirement or preparing for a wealth transfer to the next generation."

Outside of the office, Ice is a former mayor and councilman for the city of Cameron. He is an active member of his church, the Cameron Area Chamber of Commerce and Rotary Club. Also, he recently received his private pilot license and enjoys time in the air.

Why Ice Capital Management chose LPL

"After going through an extensive due diligence process and interviewing fellow advisors, we saw the switch to LPL as an obvious choice," Ice said. "LPL provides the flexibility, scale and resources needed to help us elevate the service experience for our clients. We also appreciate the [integrated ClientWorks platform](#), which gives us choice in software and helps us be more efficient, ultimately empowering the team to focus on our clients' financial goals and our relationship with them. Moreover, our move to LPL will enable us to incorporate more fee-based financial planning into the practice."

Scott Posner, LPL executive vice president, Business Development, stated, "We welcome Everett and the entire Ice Capital Management team to the LPL family, and are delighted to be their chosen partner in the next chapter of their business. Here at LPL, we offer differentiated capabilities and solutions designed around our advisors and their clients. We are driven by our mission to embolden advisors with independence while delivering the best level of support for them — and to see them succeed. We look forward to helping Ice Capital Management elevate their practice and fostering a long-lasting partnership with the team."

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

Advisors, find an [LPL business development representative](#) near you.

About LPL Financial

LPL Financial (Nasdaq: LPLA) was founded on the principle that the firm should work for the advisor, and not the other way around. Today, LPL is a leader** in the markets we serve, supporting more than 19,000 financial advisors, 800 institution-based investment programs and 450 independent RIA firms nationwide. We are steadfast in our commitment to the advisor-centered model and the belief that Americans deserve access to objective guidance from a financial advisor. At LPL, independence means that advisors have the freedom they deserve to choose the business model, services, and technology resources that allow them to run their perfect practice. And they have the freedom to manage their client relationships, because they know their clients best. Simply put, we take care of our advisors, so they can take care of their clients.

***Top RIA custodian (Cerulli Associates, 2019 U.S. RIA Marketplace Report); No. 1 Independent Broker-Dealer in the U.S (Based on total revenues, Financial Planning magazine June 1996-2020); No. 1 provider of third-party brokerage services to banks and credit unions (2020-2021 Kehler Bielan Research & Consulting Annual TPM Report); Fortune 500 as of June 2021*

*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.

Securities and advisory services offered through LPL Financial LLC, an SEC- registered broker-dealer and investment advisor. Member FINRA/ SIPC

Throughout this communication, the terms “financial advisors” and “advisors” are used to refer to registered representatives and/or investment advisor representatives affiliated with LPL Financial LLC. We routinely disclose information that may be important to shareholders in the “Investor Relations” or “Press Releases” section of our website.

Ice Capital Management and LPL Financial are separate entities.