LPL Financial Welcomes Integrity Wealth Team

Nov 2, 2021

CHARLOTTE, N.C., Nov. 02, 2021 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq:LPLA) announced today that Integrity Wealth Team has joined LPL Financial's broker-dealer, corporate registered investment advisor (RIA) and custodial platforms. The advisors reported having served approximately $175 million in advisory and brokerage assets*. They join LPL from Ameriprise Financial Services.

Based in Tampa, Fla., Integrity Wealth Team was founded when financial advisors and colleagues Lauren Silva and Nathan Helms CFP®, CIMA®, joined their practices. They believed their skills complemented each other and that a team approach would best benefit clients. Together, they provide comprehensive financial planning and socially-responsible investment advice for their client base of retirees and successful young entrepreneurs.

Looking for more flexibility, additional options and the freedom to run their business on their own terms, the advisors chose to partner with LPL. "We believe the move to LPL will upgrade the level of service and advice options that our clients deserve," Helms said. "LPL's integrated technology, combined with robust planning software, will create more efficiencies in our practice and help us differentiate the client experience. We also appreciate LPL's strong culture, values and commitment to taking care of its advisors."

For Helms, who was previously affiliated with LPL, the move to LPL was a homecoming. He said he appreciates the firm's cultural and service transformation, and he is thrilled to reunite with the industry leader.

For Silva, the move allowed her to rebrand her business under the Integrity name. She stated, "Our philosophy is to serve our clients with integrity, help to align their investments with their values, and to be able to give back to their communities in a meaningful way. We appreciate all of the options that LPL provides in the ESG and SRI space."

Scott Posner, LPL executive vice president, Business Development, stated, "We extend a warm welcome to Lauren, Nate and their team. Taking care of LPL advisors is our entire focus and mission. We are committed to helping advisors build thriving practices, where they can operate on their own terms and provide their clients with differentiated experiences. LPL is uniquely positioned in the independent marketplace to make ongoing investments in innovative capabilities and robust business resources designed to help advisors meet the evolving needs of the industry and their clients. We look forward to supporting the Integrity Wealth Team for years to come."

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 personalized 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 1996-2021); No. 1 provider of third-party brokerage services to banks and credit unions (2020-2021 Kehrer 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.

Integrity Wealth Team and LPL Financial are separate entities.

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