



## Three Advisors Join LPL Financial's Advisor Inclusion Council

Nov 10, 2021

CHARLOTTE, N.C., Nov. 10, 2021 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) (Nasdaq:LPLA) announced today that financial advisors Sam Cone, Jessica McNamee CFP®, CLU® and Grace Yung CFP® have joined the firm's Advisor Inclusion Council (AIC), which is comprised of a group of diverse representatives with different backgrounds and specialties from affiliated financial firms and institutions, along with LPL leaders.

Cone is a financial consultant at Pinsker Wealth Management in Greensboro, N.C., as well as a lawyer and dedicated advocate for progressive causes within his community and state. He is a board member and treasurer for both the N.C. Equal Access to Justice Commission and the N.C. Justice Center. McNamee is director for Heartland Planning Associates, the financial planning and wealth management team located at Heartland Bank in central Ohio. She has more than a decade in financial planning experience and is a coach and mentor to other advisors. Yung is managing director at Midtown Financial, based in Houston, Texas. She has provided advice to individuals and families since starting her practice in 1994, and is an active advocate and supporter for numerous organizations in her community.

"Our Inclusion Council members are advocates within the industry who work on behalf of thousands of other financial professionals to share experiences, help build a sense of community and address to opportunities to drive change and growth. We are honored to welcome Sam, Jessica and Grace to the AIC family," said Kraleigh Woodford, LPL senior vice president, Business Development. "While the pandemic continues to keep so many people apart, LPL's Advisor Diversity and Inclusion team has accelerated virtual and other engagement opportunities this year to help underrepresented advisors connect with peers who have similar backgrounds or clients. We recognize the value of engaging with peers to connect, learn from one another and explore LPL resources designed to help advisors grow and enhance their businesses."

**VIDEO:** Several Advisor Inclusion Council members discuss the [importance of community](#) during this year's Focus conference.

### Advisor Inclusion Council makes direct business impact

Established in 2018, the 21-member Advisor Inclusion Council contributes to solutions for three primary goals:

- Attract more underrepresented financial advisors to the industry to help reflect the changing marketplace
- Help advisors address barriers to growth and engage in new investor markets
- Create and cultivate inclusive communities for advisors to connect, learn and share best practices

By sharing their insights, expertise and experiences as advisors, members of the Advisor Inclusion Council provide critical guidance to LPL leaders, informing the development of inclusive business practices that support advisors in their mission to take care of their clients. Members' feedback has been integrated into several new programs and events to help attract more advisors to LPL to reflect the changing marketplace.

### Related Content

Read more on LPL's [commitment to diversity and inclusion](#)  
AIC Member [Jason Valle's Success Is Born from Diversity and Inclusion](#)

### 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 Kehler Bielan Research & Consulting Annual TPM Report); Fortune 500 as of June 2021*

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

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