Winget Benton Wealth Management Joins Linsco by LPL Financial

Nov 15, 2021

Employee advisors open new office in Charlotte, N.C.

CHARLOTTE, N.C., Nov. 15, 2021 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Al Winget, Rob Benton CFP® and Andrew Robson have joined LPL, affiliating with Linsco by LPL Financial, the firm's employee advisor model. They reported having served approximately $745 million in advisory, brokerage and retirement plan assets* and join LPL from Wells Fargo Advisors. The team will be the anchor tenants of Linsco's newest office in Charlotte.

At the newly-launched Winget Benton Wealth Management by LPL Financial, the advisors take a team approach to providing clients with holistic financial planning, investment advice and generational wealth planning services. They are joined by Senior Client Service Associate Donna Fitzer MBA. "We aspire to be on our clients' personal board of directors, along with CPAs and attorneys, so that we can be there for the big moments in their lives," Winget said. "We are committed to providing a high level of customer service and doing the right things for our clients."

In that spirit, the team turned to LPL for the next chapter of their business. "We were looking for more freedom to run our business on our own terms, in the best interests of our clients. LPL stood out as an industry leader, giving us the independence we craved along with open architecture to build personalized plans in a cost-effective way," Robson said, also noting that the move to LPL will pave the way for the team to potentially transition to full RIA in the future.

New Linsco office in Charlotte

The team chose the Linsco model because it allows them to have control of their practice without the additional demands of running the operations of a business. Linsco advisors have brand autonomy and the ability to make decisions on how to best run their practice. With access to LPL's integrated wealth management platform and innovative resources, advisors are also equipped with the tools they need to run a thriving practice and create differentiated experiences for clients. On top of this, Linsco advisors receive an additional layer of comprehensive turnkey support such as a dedicated marketing consultant, administrative professional services and an experienced branch management team to help support the goals of their business.

With the launch of Winget Benton Wealth Management by LPL Financial, LPL will open a new Linsco office in Charlotte's SouthPark area, approximately 15 miles from the firm's home office in Fort Mill, S.C. The Charlotte location has space to add several more advisors in the future and is expected to become one of Linsco's largest offices. This is the second Linsco office to open in North Carolina this year, following the Linsco office in Raleigh, N.C., which opened in July.

"We looked at several models over the span of two years and nothing compared to Linsco," Benton said. "We truly believe our clients will benefit from differentiated service experiences. We're excited to be the anchor tenants of a new office, where we can set the tone for the culture and create a positive atmosphere. We hope Linsco grows quickly so we can build camaraderie with other like-minded advisors."

For Winget, who grew up on a dairy farm in the Steele Creek community of Charlotte, the move represents a fresh start and renewed commitment to continue working on behalf of his clients. "I'm 69 years old, but still find such joy in helping my clients make the best use of their wealth and pursue their financial goals and dreams. This move gives me a longer runway to do what I love in a place where I can enjoy doing it."

Scott Posner, LPL executive vice president, Business Development, said, "We welcome Al, Rob, Andrew and Donna to the LPL community and congratulate them on the launch of their practice. We understand our advisors and the advice industry because it's our sole focus. And in today's environment, advisors who chose to run their business benefit from an additional layer of support for day-to-day operations so they have more time to spend where they provide the most value: in front of clients. We are honored the Winget Benton team turned to Linsco for that strategic, turnkey support. With our capacity to invest and innovate, we are able to deliver the types of solutions and capabilities designed to help advisors build their perfect practice and thrive while serving the needs of their clients. We look forward to a long-lasting relationship with Winget Benton Wealth Management and are excited to expand the Linsco presence in Charlotte."

Related

Inside the Linsco by LPL Financial model

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 (2019-2020 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.

Connect with Us!

https://twitter.com/lpl

https://www.linkedin.com/company/lpl-financial

https://www.facebook.com/LPLFinancialLLC

https://www.youtube.com/user/lplfinancialllc

Media Contact:
Lauren Hoyt-Williams
(980) 321-1232
Lauren.Hoyt-Williams@lpl.com

LPL Financial

Source: LPL Financial Holdings, Inc.