Financial Advisor Mark Ross Joins Linsco by LPL Financial

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CHARLOTTE, N.C., Feb. 22, 2022 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq:LPLA) announced today that financial advisor John “Mark” Ross has joined LPL, affiliating with Linsco by LPL, the firm’s employee advisor model. He reported having served approximately $100 million in advisory, brokerage and retirement plan assets* and joins LPL from Wells Fargo Advisors.

For more than two decades, Ross has helped clients build, manage, preserve and transition their wealth to future generations, taking a hands on approach to helping them shape their objectives and work toward their long-term goals. Based in Bozeman, Mont., Ross primarily serves business owners and ranchers across several states, with a number of clients in or approaching retirement age.

Ross started his career in the forest products industry holding several key financial management roles before transitioning to financial services. He is now thrilled to launch his new client-centered independent practice, Two Pines Wealth Advisors of LPL Financial. The name pays homage to the numerous timber pine forests throughout his native state, Arkansas, and the ponderosa pines that have become the symbol of Montana.

More flexibility with Linsco by LPL
“For the first year of the Covid pandemic, I primarily worked from home while still managing to have a very productive year and give my clients the personalized service they deserve. I recognized that I could have more flexibility in the way I work, as well as more control of my business, by joining LPL,” he said, noting that the Linsco employee model provides him with an enhanced level of support without the demands of business operations. “With Linsco, I have access to LPL’s innovative advisory platform, but I’m not flying solo. I rely on the Linsco support team for things like compliance and administration so I can focus solely on my clients and evolving my practice.”

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 equipped with the tools they need to create differentiated experiences for clients. On top of this, Linsco advisors receive comprehensive turnkey support that includes a dedicated marketing consultant, administrative professional services and an experienced branch management team to help support their goals and strategy. Ross added, “Ultimately, this move was made with my clients’ best interests in mind. I believe LPL will deliver the products and services I need to help serve my clients’ growing needs.”

Outside of work, Ross is an active member of his local community. He has served as a Boy Scouts leader and CASA advocate, and has volunteered for Habitat for Humanity as well as numerous other organizations.

Scott Posner, LPL executive vice president, Business Development, said, “We extend a warm welcome to Mark and congratulate him on taking control of his business with the launch of Two Pines Wealth Advisors at LPL. As more advisors seek flexibility in how they build their perfect practice, we are firmly committed to meeting them where they are in the evolution of their practice by offering a number of affiliation models to best serve their needs. We will continue to leverage our scale to offer innovative capabilities and wealth management resources designed to deliver value and help advisors thrive.”

Learn more at Two Pines Wealth Advisors of LPL | tpwa.lpl.com

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Inside the Linsco by LPL Financial model

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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 nearly 20,000 financial advisors, and approximately 800 institution-based investment programs and 500 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, 2020 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 Company as of June 2021. LPL and its affiliated companies provide financial services only from the United States.*

* Value approximated based on asset and holding details provided to LPL from the year 2021

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