LPL Financial

Financial Advisor Lisa Tesar Joins Linsco By LPL Financial

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CHARLOTTE, N.C., April 04, 2022 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Lisa Tesar has joined Linsco by LPL, the firm's employee advisor model. She reported to LPL having served approximately $260 million in advisory, brokerage and retirement plan assets* and joins LPL from Morgan Stanley.

Based in Cedar Rapids, Iowa, Tesar is a second-generation advisor who followed her father's footsteps into their family business, which dates back to 1936. "It was such a blessing to get trained and raised up in the industry by my dad," Tesar said. "Our team's mission is to provide experience, intellectual capital and dedicated personal service to help each client work toward their life goals. I truly want to work with good people and help make their financial dreams a reality."

At Tesar Group Investment & Financial Planning by LPL Financial, Tesar works primarily with older high-net-worth clients, with a focus on individual portfolio management for retirement income strength. She is joined by Julie Regan, client services associate, and plans to eventually bring on her son to continue the legacy practice and ensure clients are supported for generations to come.

The team turned to LPL Financial after deciding they needed a new partner that offers them the freedom to make their own decisions, along with the ability to provide personalized advice to each client. "We were especially drawn to the Linsco model, which allows us to do everything we could do at a large regional firm, but comes with individualized support and resources," Tesar said.

Linsco provides financial advisors with brand autonomy and control of the practice without the demands of business operations. With access to LPL's integrated wealth management platform and innovative resources, Linsco advisors are equipped with the tools they need to create differentiated experiences for clients. On top of this, they 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. "The fact that we get to steer our own ship and grow at our own pace is huge," Tesar said, noting they look forward to building a culture where work is fun and "feels like home."

Outside of work, Tesar is an active volunteer in her community, serving on United Way committees, Camp Wapsi Y Advisory Board, school committees, and volunteers with her church. She is a prior member of University of Iowa's Parent's Advisory Board.

"We are inspired by Lisa's dedication to her clients and commitment to continuing her family's legacy, and we are honored to welcome her into the LPL family," said Scott Posner, LPL executive vice president, Business Development. "Our advisors are the focus of everything we do. We remain committed to providing the support and service they need to build their practice on their own terms, and we will continue to deliver innovative technology and business resources designed to help them thrive. We look forward to a long-lasting relationship with Tesar Group Investment & Financial Planning by LPL Financial."

Learn more at Tesar Group Investment & Financial Planning by LPL Financial

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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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