LPL Financial

The R. B. Mitchell Team Joins Linsco by LPL Financial

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CHARLOTTE, N.C., April 21, 2022 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq:LPLA) announced today that financial advisor Robert Mitchell has joined LPL, affiliating with Linsco by LPL Financial, the firm's employee advisor model. He reported to LPL having served approximately $425 million in advisory and brokerage assets,* and joins LPL from Stifel. The R. B. Mitchell Team Powered by LPL Financial will be the anchor tenant in a new Greensboro, N.C. Linsco office.

Mitchell grew up as an orphan and never dreamed he would one day run a successful business where he makes a daily impact on his clients' lives. After growing up in an orphanage and later facing homelessness as a young adult, Mitchell made it his mission to make a difference in the lives of as many people as possible by helping them as they work toward their financial goals. With the intent of never turning a client away, Mitchell chooses not to set account minimums so he can help people from all walks of life and income backgrounds—anyone from high-net-worth individuals to those the team affectionately refers to as "Uncle Joes and Aunt Marys."

As he grew the practice from the ground up, Mitchell pulled in team members with various experience and skillsets so they can operate as a full service firm to serve clients' holistic financial needs. He is joined by wealth associates Joanna Page, CPA, and Jonathan Peters, CFP, as well as registered client service associate Andrea Wisekal.

Why the R. B. Mitchell Team Chose Linsco
To help meet the evolving needs of their growing client base and continue to provide quality service, the team turned to LPL Financial. "We're not purely a transactional business – we care about our clients and want to give them the attention they deserve. LPL values that same quality approach; they put their advisors first and that's something that always stood out to us," Mitchell said.

Page added, "We believe that Linsco's individualized support and comprehensive resources will also allow us to focus on the unique needs of our clients – which, at the end of the day, is what we value most."

Linsco advisors are supported with holistic transition services that allows them to continue to focus on their clients. From there, advisors have access to a variety of dedicated resources, including hands-on marketing support, administrative support, experienced branch managers, integrated technology and more. The team also benefits from the strength of LPL's innovative digital tools and capabilities, services and business support to help advisors manage and grow their business efficiently.

The R. B. Mitchell Team shared that they were deeply impressed by LPL's capabilities, which provides choice and flexibility in portfolio management and software options. "We have always wanted to be on the cutting edge of the industry, and we found a new partner that is committed to investing in innovative capabilities," Peters said. "We believe our clients will be 'wowed' by all of the stuff we can do now."

Scott Posner, LPL executive vice president, Business Development, said, "We're thrilled to welcome Rob, Joanna, Jonathan and Andrea to the LPL community. We're inspired by this tight-knit team and their commitment to serving their clients. They are a great example of a hands-on team that is willing to pivot and adapt as the industry changes, and we're proud to support them through our integrated capabilities, robust resources and business solutions. I'm so glad that they found the Linsco model, which will allow them to manage their practice and grow on their own terms. We are excited to expand the Linsco presence in Greensboro and look forward to a long-lasting relationship with The R. B. Mitchell Team Powered 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

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.

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