LPL Financial

# Broadway Wealth Management Joins Linsco by LPL Financial

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CHARLOTTE, N.C., Sept. 08, 2022 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that the financial advisors at Broadway Wealth Management Group have joined LPL, affiliating with Linsco by LPL Financial, the firm's employee advisor model. The group reported having served approximately $600 million in advisory and brokerage assets,* and joins LPL from Merrill Lynch.

Driven by a determination to positively impact people's lives, Broadway Wealth Management has made it their mission as financial professionals to help clients adopt healthy financial habits and accomplish their wealth management goals. With over 100 years of collective experience in different segments of the financial services industry, they understand the significance of face-to-face interactions with a client-centric approach. The team works closely with clients to discern their full financial picture and view their unique needs from a broader perspective.

The team at Broadway Wealth Management is not only well-versed in financial planning and preparing for their clients' future, they are also passionate about doing meaningful work. They maintain a diverse level of experience and expertise to operate as a full-service firm with an emphasis on retirement planning. These seasoned financial professionals include Justin Hurd, David Earl Spencer, George Alessandria, Brandy Ebron, Sylvia Jorgensen and Ryan Larragoity. Broadway Wealth Management of LPL Financial will operate out of two office locations: Oakland, Calif., and Savannah, Ga.

**Why Broadway Wealth Management chose Linsco by LPL Financial**

Aiming to expand their suite of services and increase client assets, the team at Broadway Wealth Management ranked LPL Financial their top choice. "We were essentially looking for the best model to serve our clients and grow our practice without any distraction, and aligning with Linsco by LPL enables our firm to do just that," said Hurd. "LPL offers the administrative support and turnkey services we need to fully dedicate our efforts to strengthening relationships with our clients and addressing their unique financial needs. At LPL, our team can find straightforward answers and solutions to our business issues, while enjoying the autonomy of building our brand and business in our day-to-day work."

Linsco is an evolutionary model which places financial advisors front and center — their feedback fuels and inspires its innovation. Linsco advisors are equipped with the autonomy and flexibility to run their businesses efficiently, knowing that they are supported by robust resources, a dedicated marketing consultant and an experienced branch management team who serve as advocates and thought partners. As one of the country's top wealth management firms, LPL's ongoing investment in its platforms allows for scale and capacity to provide personalized advisory solutions and bespoke services.

The team at Broadway Wealth Management looks forward to integrating LPL's sophisticated tools and solutions into their clients' experience. "Our transition has been seamless — LPL's focus on advisors ability to build a business of value on their own terms is perfectly in tune with our business goals. With this move, our team can streamline processes and minimize the time we spend doing administrative work. We are also impressed by LPL's open architecture, which gives us flexibility to explore new technology and capabilities," Spencer added.

Scott Posner, LPL executive vice president, Business Development, said, "It is an honor to welcome Justin, David, George, Brandy, Sylvia and Ryan to the LPL community. Tight-knit teams like Broadway amaze and inspire us every day with their passion for serving clients and making positive impact in their lives. At LPL, we believe advisors know best, so we work behind the scenes to put the control in our advisors' hands, delivering expertise that emboldens them to deliver the best possible services to their clients. Linsco advisors get the best of both worlds — support and security — without worrying about administrative operations. We are proud to support the Broadway Wealth Management team of LPL Financial, and we look forward to a long-lasting partnership with them."

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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 21,000 financial advisors, and approximately 1,100 institution-based investment programs and approximately 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.

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

***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.*

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