



## Multigenerational Financial Advisor Team Joins Linsco by LPL Financial

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CHARLOTTE, N.C., Sept. 13, 2022 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that Kelly Wealth Advisors has launched on LPL's employee advisor model, [Linsco by LPL Financial](#). Kelly Wealth Advisors reported having served nearly \$300 million in advisory, brokerage and retirement assets\*, and joins LPL from Wells Fargo.

Led by father and daughter Tom and Maureen Kelly, the team also includes Marla Scott in a client service support role. They operate out of Lynnwood, Wash., located just north of Seattle. Founder Tom Kelly grew up in the northwest and built his practice on a foundation of personalized investment services to his clients throughout the local community. Kelly Wealth Advisors has followed that tradition by building meaningful relationships and continuing to provide their clients with personalized service and value.

"I actually began my career in financial services at a local community bank," said Tom. "I registered and ran the brokerage business for the bank's investment services division for many years. Looking back, it's refreshing to know that many of those customers from the early days remain clients today, along with their other family members."

The multigenerational practice builds upon those community-based relationships. The team works with many local families to help them build their financial wealth portfolios and determine how to best pass those along to their families. "Assets pass from one generation to the next, so we are working with grandparents, parents and children, all at the same time," added Tom.

### Why the move to Linsco by LPL

Kelly Wealth Advisors began searching for a different platform to run their business in order to better serve their clients. As a broker-centric firm, LPL provides the Kellys with the chance to realize the core tenets of independence like client ownership and flexibility to run their practice their way, without having to bear the operational complexities like real estate, benefits, compliance and HR.

"We are very forward-thinking and are confident the next level technology from LPL will enhance our practice immensely," said Maureen Kelly. "We look forward to working together with Linsco by LPL because the people, technology and services are superb."

Scott Posner, LPL Executive Vice President, Business Development, added, "We're really excited to welcome Tom, Maureen and Marla to LPL. Our integrated technology platforms are designed to help firms such as theirs offer the kind of seamless and personalized digital experiences that can help them and their clients thrive well into the next generations. We can't wait to see how they utilize LPL's technology, marketing solutions and other holistic services to build their practice of the future."

### Related

Learn more about [Kelly Wealth Advisors of LPL Financial](#).

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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 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-end 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 Kehler Bielan Research & Consulting Annual TPM Report); Fortune 500 Company since June 2021. LPL and its affiliated companies provide financial services only from the United States.*

Securities and advisory services offered through LPL Financial, a registered investment advisor. Member FINRA/SIPC.

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