Women-Led Oregon Team Joins LPL Financial

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CHARLOTTE, N.C., Sept. 20, 2022 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that Rubino, Skedsvold, Moran & Associates has joined LPL Financial's broker-dealer, RIA and custodial platforms. The advisors reported having served approximately $340 million in advisory, brokerage and retirement assets*, and join LPL from Ameriprise.

Based in Portland, Ore., the team is led by Judy Rubino CFP®, and Kari Skedsvold, CPA, CRPC®, who spent the past 24 years working together to build up the boutique business. They are joined by Devin Moran, CFP®, financial planning assistant Mercedes Arntson, CFP®, and client service associates Breanna Steigers and Siri Miller. Skedsvold and Rubino have been recipients of the Five Star Award annually between 2012-2022.

"We know our clients' finances inside out and offer in-depth personalized services to help them create wealth building strategies and work toward their goals," Skedsvold said, noting they take a holistic planning approach for their client base of doctors, executives, women and high-net-worth professionals. "We have very strong relationships and deep experiences with our clients."

Looking for more flexibility and enhanced technology, the team chose to move to LPL Financial.

"We've evolved and grown over the years, so it was important to partner with a firm that is aligned with our values and goals," Rubino said. "LPL is very progressive and offers a transparent, independent platform that is more suited for where our practice is today and in the future."

The move was made with succession planning in mind.

"We've spent our entire adult lives helping people. We've created a legacy and need our team to help carry that on," Rubino said. "We are excited to move to a supportive environment where we can grow our practice on our own terms, with a relatively young team who can continue to deliver the comprehensive service that our clients have come to expect."

The team also appreciates access to LPL's innovative tools and resources designed to help them optimize each day. "I'm looking forward to having more time to further my relationships with clients and really drill down on their portfolios," Skedsvold said.

Scott Posner, LPL Executive Vice President, Business Development, added, "We extend a warm welcome to Judy, Kari and their entire team. At LPL, we believe advisors know what's best for their clients. In fact, our core mission is to take care of advisors so they can take care of their clients, and we do this by supporting them with a wide range of differentiated services and innovative technology experiences designed to help them thrive. We are honored that Rubino, Skedsvold, Moran & Associates recognized that we can provide a solid foundation for the future of their business, and we look forward to a long-lasting partnership for years to come."

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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 Kehrer 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.*

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Media Contact:
Shannon Greene
(704) 996-1840
Media.relations@LPLFinancial.com