



## Vero Wealth Management Becomes 25th Team to Join Linsco by LPL Financial

September 26, 2022

CHARLOTTE, N.C., Sept. 26, 2022 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) (Nasdaq: LPLA) announced today that financial advisors Benjamin Link CFP®, CRPS, AAMS, and Steve Sexton CIMA®, CFP®, AWMA, CRPC and LUTCF, have joined LPL's employee advisor model, [Linsco by LPL Financial](#) ("Linsco"). The team reported having served approximately \$380 million in advisory, brokerage and retirement assets\*, and join LPL from Truist Investment Services.

They become the 25<sup>th</sup> team to join the highly attractive Linsco platform, which is quickly expanding its' branch-office footprint across the country. Linsco also serves as the business model for [Allen & Company](#) and [Boenning and Scattergood](#) set to close in Q1 2023. Linsco by LPL serves financial advisors seeking the core tenets of independence, including owning their client relationships and having flexibility to run their practice, their way. However, business operations such as real estate, health and wellness benefits, compliance and human resources are handled by a highly-skilled and dedicated Linsco support team, freeing up more time for advisors to focus on serving their clients.

With the move to LPL, Sexton and Link launched Vero Wealth Management Powered by LPL Financial, becoming Linsco's second office in Greensboro, N.C. They are joined by Senior Registered Client Service Associate staff members, Tracie Lucas and Shirley Sohmer.

The advisors teamed up six years ago, both bringing extensive experience in the financial services industry and from other fields. Link, who has an analytical background and love of people, has spent 19 years as a financial advisor focused on planning and investment management and has prior experience in alternative energy. Sexton started his career in life insurance 26 years ago before earning his securities license and CFP in an effort to expand the client experience and help guide them toward long-term financial health.

The team offers fee-based services that provide process-oriented, holistic financial planning and services for a client base of individuals, families and small business owners, mostly at or near retirement age looking for a "work-optional lifestyle," Sexton said. "We are planners first. We take time to really get to know the client, both financially and personally before anything else. Clients value this, along with our advice."

### Why Linsco by LPL?

Looking to optimize their business with more efficient technology and practice support, Link and Sexton chose to move to LPL. The Linsco model stood out to them because it gives the best of both worlds: LPL's sophisticated wealth management platform and leading technology capabilities, as well as a blend of reliable business strategy services designed to help advisors run thriving practices.

"LPL is focused on supporting advisors and helping them be successful. We appreciate all of the vast resources that we now have available to help us serve clients better," Link said. "We will be optimizing our practice with efficient technology, all synchronized so it works beautifully together. We look forward to growing the business, offering more services and staying ahead of our clients' needs."

Their move to LPL was shepherded by Bridgemark Strategies, an outside recruiting firm that recommended Linsco to the team. "Knowing Steve and Ben for over 10 years, I knew they weren't going to switch broker-dealers without first doing an exhaustive search of different firms," said Corey Walen, managing director of Bridgemark Strategies. "They needed to make sure their new BD was going to be able to give them the technology and tools to be able to better service their clients and run their business more efficiently."

"LPL's Linsco model was the perfect choice for them," Walen continued. "They will own their business and clients and build equity in that business. LPL becomes responsible for many of the stresses of running a business such as office space and health insurance, allowing them to focus more on clients."

Scott Posner, LPL Executive Vice President, Business Development, added, "We are thrilled to welcome Steve and Ben as the 25<sup>th</sup> team in the Linsco community. We congratulate them on the launch of Vero Wealth Management and look forward to a long-lasting and successful relationship with the team. With LPL's support, more advisors are recognizing the importance of freedom as they seek ways to differentiate themselves and win their market. Linsco grants advisors true client ownership and the freedom to manage and grow their relationships – and business – as they see fit."

### More on Linsco

Linsco began in 2019 with the closing of its acquisition of Allen & Company of Florida (Allen & Company), a broker-dealer and registered investment adviser (RIA) based in Lakeland, Fla. As a result, approximately \$3 billion of client assets transferred onto the Linsco platform which set the pathway for the growing employee financial advisor model.

LPL continues to focus on the growth of Linsco through recruiting financial advisors and their teams typically from wirehouse and regionals. LPL also has a strong focus on acquiring firms where the business model fits the needs of what they are trying to accomplish for their advisors. This has proven successful with Allen & Company, and LPL is set to onboard Boenning and Scattergood in Q1 2023.

### Related

Learn more about [Vero Wealth Management Powered by 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.*

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*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 1996-2022); among third-party providers of brokerage services to banks and credit unions, No. 1 in AUM Growth from Financial Institutions; No. 1 in Market Share of AUM from Financial Institutions; No. 1 in Market Share of Revenue from Financial Institutions; No. 1 on Financial Institution Market Share; No. 1 on Share of Advisors. (2021-2022 Kehrer Bielan Research & Consulting Annual TPM Report). Fortune 500 as of June 2021.*

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