



Artiea Capital Management Joins LPL Financial

November 7, 2022

CHARLOTTE, N.C., Nov. 07, 2022 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that the team at Artiea Capital Management has joined LPL Financial's broker-dealer, RIA and custodial platforms. They reported having served approximately \$630 million in advisory, brokerage and retirement assets*, and join LPL from Wells Fargo Financial Advisors Network.

Based in Westlake Village, Calif., Artiea Capital Management was formed in 2011 with a mission to partner with clients to help them more confidently navigate their financial path and amplify the joys of a life well-lived. Partner financial advisors Paul Artof, CFP®, Joel Chithea, Jason Artof CFP®, and Jamie Wood CRPC lead the team, which also includes wealth advisor Cassandra Mettlen, paraplanner Scott Davis, senior registered client associate Rosalyn Weihe and client services associate Melinda Heydon.

"We're an ensemble practice, and each partner's diverse background and training brings a breadth of knowledge and focus to Artiea Capital Management," Wood said. "We focus on giving complex comprehensive advice, and each one of us has our own specialty, whether it be fixed income, investment portfolio management, financial planning, insurance protection, tax-based investing, or intergenerational wealth transfer, among other services. We work together using our specific talents to pursue positive outcomes for our clients."

As the financial services industry continues to evolve, the Artiea team turned to LPL to help them deepen relationships with clients and enhance their practice.

"It was important for us to partner with a firm that gives us the tools to be able to service our clients to the best of our abilities, and LPL is the home to do just that," Chithea said. "LPL shares our entrepreneurial spirit and understands what it's like to be in business for yourself. We now have more choice and flexibility in how we build our business and in the capabilities available to us."

The team also appreciates access to more planning tools and choice in CRMs, along with additional reporting and research resources. "All of this allows us to customize our business for each client's needs and provide a more tailored approach," Chithea said.

Jason Artof noted, "The platform's open architecture provides us with the ability to integrate a broad spectrum of software tools to enhance our financial planning process."

Wood added, "We also love that we're now working side by side with 21,000 other LPL advisors that we can share ideas with and discuss best practices. We look forward to attending conferences with our LPL colleagues – we love to grow and want to stay ahead of the curve."

Scott Posner, LPL Executive Vice President, Business Development, added, "On behalf of the entire LPL community, I extend a warm welcome to Artiea Capital Management. We are proud that our integrated platform serves as a differentiator for this team. We are committed to delivering value in affiliation with LPL by making ongoing investments in the technology and innovative solutions designed to help advisors thrive. We thank Artiea Capital Management for their new partnership and look forward to supporting them for many 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 1996-2022); 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 Kehler Bielan Research & Consulting Annual TPM Report). Fortune 500 as of June 2021.*

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CRPC conferred by College for Financial Planning

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