Financial Advisor Tim Truebenbach Joins Linsco by LPL Financial

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CHARLOTTE, N.C., Nov. 14, 2022 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Tim Truebenbach CFP®, has joined LPL's employee advisor channel, Linsco by LPL Financial ("Linsco"). He reported having served approximately $350 million in advisory, brokerage and retirement assets*, and joins LPL from Morgan Stanley. He will be the anchor tenant in a newly built Linsco office in Tacoma, Wash.

Truebenbach, who gained his enthusiasm for the stock market as a junior in high school, is a seasoned advisor with more than 25 years of industry experience. He grew his business from the ground up by providing comprehensive financial planning and wealth management to high-net-worth families, trusts and businesses. He is supported by Registered Client Services Associate Wendy Keefe.

"We believe that financial planning powered by asset allocation should be the cornerstone of each client's portfolio," Truebenbach said. "We take a three pillar approach to helping clients based on proactive and regular communication. It begins with **process**, which leads to smarter decisions, and then **collaboration** between a client and their entire financial team followed by **personal attention** each step of the way."

Ultimately, Truebenbach says the driving question at the firm is, "How does it benefit the client?" And that's exactly what led him to LPL.

In launching True Private Wealth Powered by LPL Financial, it was important for Truebenbach to join a firm that would allow him flexibility and the ability to build his business on his own terms.

"I went through an extensive due diligence process to look into how we could better serve clients with more meaning, in ways that matters to them," Truebenbach said. "This move allows me the freedom to do what I want for my business and focus my time on my own agenda, which is to shift more into investing, planning and the client experience."

Why Linsco by LPL?

Truebenbach, who had become accustomed to having the support of a large firm, said the Linsco employee advisor model offers the best of both worlds: The ability to call the shots for his business and clients, along with access to LPL's leading technology capabilities, resources and a dedicated support team that allows him to focus on what matters most: his clients.

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. With Linsco, advisors benefit from the support from an experienced branch management team, dedicated marketing consultant, technology consultant, and service team, freeing up more time for advisors to focus on helping their clients.

"I didn't want to wear the business manager hat or feel like I'm always swimming upstream," Truebenbach said. "With Linsco, I don't have to do it all on my own. The whole platform is designed to support my office so I can take care of clients."

Scott Posner, LPL Executive Vice President, Business Development, added, "On behalf of LPL, I'm pleased to welcome Tim to the LPL community. His desire to keep clients' needs at top of mind is firmly aligned with LPL's mission to take care of our advisors so they can take care of their clients. We do this by creating differentiated and compelling experiences, for both advisors and their clients. We deliver independent solutions designed to meet advisors where they are in the evolution of their practice, providing them with choice and flexibility in how they manage and grow their business. We look forward to a long-lasting relationship with True Private Wealth 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 more than 21,000 financial advisors, including advisors at approximately 1,100 institution-based investment programs and at approximately 500 registered investment advisor ("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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Media Contact:
Media.relations@LPLFinancial.com
(704) 996-1840

Tracking #1-05345611