



LPL Financial Welcomes Fenton Wangler Financial

Jan 12, 2023

CHARLOTTE, N.C., Jan. 12, 2023 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisors Eric Fenton and Rodney Wangler have joined LPL Financial's broker-dealer, RIA and custodial platforms, aligned with JFC Advisor Network. They reported having served approximately \$300 million in advisory, brokerage and retirement plan assets*, and join LPL from Securities America, part of the Advisor Group network.

Based in Vancouver, Wash., the advisors founded Fenton Wangler Financial in 2001 with a mission to provide independent financial services focused heavily on personalized financial planning and risk management.

"One of the biggest challenges for most people is to make sure they don't run out of money once they hit retirement age," Wangler said. "We work closely with each client in their transition from wealth accumulation to wealth distribution, focusing on keeping pace with inflation and the value of a dollar."

In looking at the financial services landscape with so much industry consolidation, Fenton and Wangler determined it was time to find a new partner. They turned to LPL for its financial strength, self-clearing capabilities and commitment to technology.

"LPL invests heavily in its innovative technology, which is critical to keep pace in this ever-changing environment," Fenton said. "We recognized that we needed a platform such as LPL's ClientWorks where everything is connected, making it easier to do business. Our clients will also appreciate Account View, where they can easily view reports and account information in one place."

During the due diligence process, the team was equally impressed with JFC's concierge level of service and added resources.

"Ultimately, it came down to the technology and service, with the breadth of everything that LPL provides combined with the small town Midwest-feel of JFC's customer service," Fenton said. "Having the two together is such an advantage—one that will truly help us elevate our practice and take better care of each client's needs."

JFC Advisor Network President Jack Connealy stated, "We are honored to welcome Eric, Rod and the Fenton Wangler Financial team to JFC Advisor Network. The tireless commitment and extraordinary quality of care they provide to their clients demonstrates that Eric and Rod are a great fit with JFC and LPL. We look forward to supporting the team throughout their transition and helping them leverage the multitude of benefits derived from their partnership with LPL, while proving them with a personal and customized community experience through JFC."

Scott Posner, LPL Executive Vice President, Business Development, added, "We welcome Eric and Rod to the LPL community and congratulate JFC on its continued growth. More than ever, advisors need to leverage technology to increase efficiencies and offer a digital service experience to meet investors' demands. At LPL, we are committed to investing in innovative capabilities designed to help advisors enhance their value proposition, deliver delightful experiences to their clients and run a thriving practice. We wish Fenton Wangler Financial a successful future and look forward to a long-lasting relationship with the entire team."

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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 2022.*

***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.*

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. Fenton Wangler Financial, JFC Advisor Network and LPL Financial are separate entities.

Throughout this communication, the terms “financial advisors” and “advisors” are used to refer to registered representatives and/or investment advisor representatives affiliated with LPL Financial LLC.

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Media Contact:

Media.relations@LPLFinancial.com

(704) 996-1840