



LPL Financial Welcomes New Linsco Teams in Texas and Florida

Jan 23, 2023

CHARLOTTE, N.C., Jan. 23, 2023 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that two teams of financial advisors who serve a combined \$275 million in advisory, brokerage and retirement plan assets* have joined LPL's employee advisor channel, [Linsco by LPL Financial](#) ("Linsco"). Chris Corcoran CRPC[®], joins from Merrill Lynch and will be the first tenant in a new Linsco office in Houston, Texas. Additionally, Matt Jackson and Adam Callender CRPC[®], join LPL from Truist and will work remotely from Northeast Florida.

About Memorial Financial Advisors of LPL Financial

With nearly 25 years of industry experience, Corcoran's mission is to be transparent and honest in his work to help clients make sensible decisions that move them closer to their financial goals. He works primarily with oil and gas engineers and other self-made clients.

"I entered financial services because I saw the impact it has on a person's life. I found that many people don't have the experience or inclination to create a plan for their financial future, but with the right guidance and processes in place, they are better prepared to send their children to college, retire comfortably and distribute wealth to the next generation," Corcoran said. "I've spent two decades building a relationship-driven practice where I do my best to provide great experiences, financial education and timely advice, all actionable and simple to understand."

With the move to LPL, Corcoran launches Memorial Financial Advisors of LPL Financial, named after the affluent, suburban Memorial area of Houston.

About Jackson Callender Group Wealth Management Powered by LPL Financial

With a combined 22 years of financial services experience, Jackson and Callender have worked together since 2006, having shifted from the mortgage industry to wealth management in 2010. The advisors specialize in retirement planning, investment solutions and appropriate risk management strategies, and they are joined by Registered Client Service Associate Tiffany Nessmith.

"Our process begins by understanding each client's goals and learning about their family and interests," Jackson said. "Then, we tailor a combination of strategies for each client, helping them understand and adjust for the impact of key events in the market as they work toward financial success."

Why Linsco by LPL?

Both teams turned to Linsco by LPL in their quest to enhance the service experience for clients and operate on their own terms, with the freedom and flexibility to focus on what's best for their clients and business.

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.

As the anchor tenant in the new Houston Linsco office, Corcoran hopes to set the tone for an open, welcoming and friendly environment. He looks forward to the next phase of his career.

"I've met with every large financial services firm over the past two years, and with LPL I feel like I've found a true partner to help me create a practice on my own terms," Corcoran said. "I wanted to be a W2 employee so I didn't have to worry about real estate or running the business, but I also wanted flexibility to control my own practice. Linsco combines the best of both worlds. I've always said I'm going to do what's best for my clients and ensure they have great experiences, and this move supports that mission."

The Jackson Callender Group echoed that sentiment.

"We spoke with seven firms during our due diligence process, but LPL stood out as the best place where we can service our clients and grow our business," Callender said. "Linsco is a nice blend of what we were looking for. It empowers us to make our own decisions, while also giving us a technology upgrade, easier processes and dedicated support to help with operations so we can keep focus on helping our clients."

Scott Posner, LPL Executive Vice President, Business Development, added, "We welcome these teams to the Linsco community and are honored that Chris, Matt and Adam recognized that LPL can help them take their practice to the next level. Linsco advisors enjoy all the benefits of being an LPL employee, along with autonomy to manage their practice on their own terms. At LPL, we understand that advisors want the freedom and flexibility to provide personalized financial guidance and differentiated service experiences. We are deeply committed to supporting them with integrated capabilities, robust resources and business

solutions designed to help their practice thrive. We wish nothing but success for Memorial Financial Advisors and Jackson Callender Wealth Management and look forward to an exciting journey ahead with these teams.”

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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 Biel Research & Consulting Annual TPM Report). Fortune 500 as of June 2021.*

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