LPL Financial

LPL Financial Welcomes Advisor Jonathan Blakelock

January 30, 2023

CHARLOTTE, N.C., Jan. 30, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq:LPLA) announced today that financial advisor Jonathan Blakelock CFP®, has joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported having served approximately $180 million in advisory and brokerage assets*, and joins LPL from Ameriprise.

Based in Kingwood, Texas, a suburb of Houston, Blakelock is an Army veteran with an analytical background stemming from graduate school work at the University of Houston's Cougar Investment Fund. Blakelock started his career as a financial advisor in 2007 and has grown his business organically over the years, now serving more than 400 clients in 17 states. He is joined at Blakelock Financial Group by a six member support staff.

"What motivates me is helping people and knowing that I can make a difference in the lives of my clients through financial planning," Blakelock said. "We take a very hands-on, analytical approach to helping clients find a way to solve problems and work toward a more secure financial future."

Seeking more flexibility and choice, especially in the area of financial planning, Blakelock decided to move his business to LPL.

"LPL has several advanced planning programs to choose from, along with more mutual funds and innovative solutions to deliver better experiences for my clients," Blakelock said. "This move will give me more tools and flexibility, while still providing oversight that my clients want. It also allows me to brand my business and have more control in the way we operate."

Scott Posner, LPL Executive Vice President, Business Development, added, "We extend a warm welcome to Jonathan and are honored that he recognized LPL's ability to provide robust planning tools and differentiated experiences that can't be found anywhere else in the wealth management industry. We will continue to invest in capabilities and solutions designed to help advisors bring added value to their clients, and we look forward to supporting Blakelock Financial Group for 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 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 Kehrer Bielan Research & Consulting Annual TPM Report). Fortune 500 as of June 2021.*

LPL Financial and its affiliated companies provide financial services only from the United States.

Securities and advisory services offered through LPL Financial LLC, an SEC-registered broker-dealer and investment advisor. Member FINRA/SIPC. Blakelock Financial Group 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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