



## Carnegie Private Wealth Launches With Support of LPL Strategic Wealth Services

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CHARLOTTE, N.C., March 06, 2023 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) (Nasdaq: LPLA) announced today that three teams of highly successful financial advisors have joined forces for the launch of a new independent practice, [Carnegie Private Wealth](#), through affiliation with [LPL Strategic Wealth Services](#), a modern breakaway solution for advisors seeking to gain more control over their business. The advisors reported having served a collective \$1.45 billion in advisory, brokerage and retirement plan assets\*. They join LPL from Wells Fargo Advisors.

### [Meet Angie Ostendarp, Jordan Raniszkeski and Mary Sherrill Ware](#)

Based in Charlotte's South Park community, Carnegie Private Wealth is founded by Angie Ostendarp CFP<sup>®</sup>, Jordan Raniszkeski CFP<sup>®</sup>, and Mary Sherrill Ware CFP<sup>®</sup>, a highly decorated team of advisors that recently ranked as one of the Top 10 Best-In-State Wealth Management Teams in North Carolina by *Forbes*\*\*<sup>®</sup>. The core group, which also includes seven client services support members, has evolved over the years to create a purposeful, family-oriented practice with a commitment to going above and beyond for clients.

"We have an incredible team with over 120 years of experience combined and we all share the same common goal: to serve clients first," Ware said. "We are so much more than a traditional money manager. Our job is to make our clients' lives easier; to give them confidence and help them work toward their dreams while reducing stress around finances. There's not a single financial topic that we don't assist our clients with."

With the move to LPL, they are joined by longtime colleagues Mitch Mayfield and Jeff Vandiver, each having previously run very successful individual practices.

### [Meet Mitch Mayfield](#)

With 30 years of industry experience, Mayfield has known Ostendarp since their first class together back at the former Wachovia Securities. He's steadily grown his practice over the years and is proud of the long-lasting relationships he's built with clients through the decades. Mayfield believes in frequent touch points and open communication as he guides clients on their financial journey.

"By going independent and joining the Carnegie team, we'll have shared resources, knowledge and information to help better serve my clients and ensure they're taken care of well into the future," he said. "It's going to be a tremendous group of people working together. I've known the other Carnegie advisors for a long time and we share the same culture and family-centric values."

### [Meet Jeff Vandiver](#)

Vandiver is another industry veteran with 30-plus years in financial services. He started as an associate, rising up through the ranks as he grew his practice organically, building friendships with clients along the way. He takes a planning-based approach, helping clients understand the big picture by providing personalized strategies tailored to each person's unique needs. Now at Carnegie, Vandiver will continue to serve his clients with the same high-touch services as before while also leveraging the ideas and experiences of a broader team.

"Putting the clients' needs first is the difference between serving them versus advising them," said Vandiver. "I've been friends with Angie, Jordan and Mitch for 20 years, and this felt like the right time to make a move that adds significant value to my clients. I look at it as a way to really be able to serve clients in the best way possible."

### **Making the move to LPL Strategic Wealth Services**

In envisioning the next chapter of their business, the advisors sought more flexibility and independence, as well as enhanced technology and improved communication with clients. It was of utmost importance to create the type of remarkable client experience that would help separate Carnegie Private Wealth from other firms in the region. The team is planning to quickly expand its service model to offer more tailored experiences for corporate executives and business owners.

"After thinking through all the options available in the marketplace, the opportunity to create our own firm at LPL with a culture that prioritizes clients' needs and interests above everything else just felt like the right way forward," Raniszkeski said. "Having the chance to start from scratch and build things exactly how we want them has been so rewarding and we are so excited for clients to experience what we have built. From choosing our own location and every piece of furniture and stitch of fabric to our broker/dealer partner and the integrated technology that we use on a daily basis, we have had a hand in choosing every last detail

about Carnegie Private Wealth.”

Advisors who join [Strategic Wealth](#) have access to LPL’s integrated wealth management platform, along with an added layer of ongoing strategic support for daily operations and long-term business management. They benefit from a truly integrated service that includes simplified pricing, technology and dedicated support to launch their practice at LPL. Then, after the transition is complete, Strategic Wealth teams receive ongoing operations support managed by a team of experienced professionals including a business strategist, marketing partner, CFO and administrative assistant. Advisors have one point of contact and dedicated resources, ultimately allowing them to stay focused on the needs of their clients, culture and evolution of their practice.

“With the support of our Strategic Wealth partners and all the resources they provide to us, we’ll be more nimble and flexible, giving us more time to spend with our clients and focus on things that we are passionate about,” Ostendarp said. “This move is truly the best of both worlds. We have the freedom and flexibility to serve our clients at the highest possible level while receiving the support necessary to run a great business.”

Outside of work, the Carnegie team is heavily involved in the community. In addition to many boards and foundations that advisors are involved with personally, Carnegie Private Wealth supports several organizations that help make the Carolinas a better place, including MiraVia, Habitat for Humanity, Women’s Impact Fund, Good Fellows, Good Friends and Junior Achievement.

Scott Posner, LPL Executive Vice President, Business Development, added, “We congratulate Angie, Jordan, Mary, Mitch and Jeff on the launch of Carnegie Private Wealth. We are honored to be their strategic partner as they set out to build their ideal independent practice and provide elevated experiences for their clients. LPL Strategic Wealth Services is deeply committed to delivering a sophisticated wealth management platform, along with comprehensive modern services and a dedicated support team so advisors can focus on what matters most—serving the needs of their clients. We welcome the entire Carnegie team into the LPL community and look forward to an exciting journey ahead.”

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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 enterprises 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.*

*\*\*The 2023 Forbes ranking of Best-In-State Wealth Management Teams, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone, virtual and in-person due diligence interviews, and quantitative data. This qualitative criteria focus on studying each team’s best practices—service models, investing process, team construct, skill sets, etc. The algorithm also weighs factors like revenue trends, assets under management, compliance records. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receive a fee in exchange for rankings.*

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