



LPL Financial Welcomes Advisor Nick Lalonde

March 13, 2023

CHARLOTTE, N.C., March 13, 2023 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisor Nick Lalonde CFP®, CEPA®, has launched an independent practice and joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported having served approximately \$200 million in advisory, brokerage and retirement plan assets*, and joins LPL from Edward Jones.

Based in Dallas, Lalonde started in the profession right out of college, nearly a decade ago, and became one of the youngest CFP® professionals in the country at age 24. In that time, he built his business swiftly, working with business owners, businesses and successful professionals. He often refers to a quote from motivational speaker Zig Ziglar for his long-term success: "You can have everything in life you want, if you will just help enough other people get what they want."

"That's been a core principle since I've been in the financial planning industry," Lalonde said. "I've learned that success is a byproduct of the impact you make on others."

Lalonde's commitment to excellence drove him to LPL.

"In the pursuit of deeply serving clients, we have had to say 'no' to many relationships over the years so we could say 'yes' to the right relationships," Lalonde said. "Our focus has been on partnering with clients we mutually align with and that we can do our best planning for. This journey led to a desire to have more flexibility around solutions and technology. Our due diligence process brought us to LPL where we have Fortune 500 muscle, innovative offerings, and the ability to brand ourselves and operate on our own terms."

With the move to independence, Lalonde has named his practice Third Act Wealth Management. "We've found that life is divided into three acts: The first act is about learning, the second act is about building and growing. The third act is about finding new identity and purpose. In my business, the first act was all about learning the industry, the second was spent growing my client base. My third act, where I am today, is purpose driven. It's about creating a company where my clients are the hero."

Lalonde, who is joined by Client Service Managers Jaylene Roloff and Liz Christensen, will expand the practice soon by adding junior financial advisors and paraplanners. Their goal is to become the top financial planning office in the country.

Scott Posner, LPL Executive Vice President, Business Development, added, "We welcome Nick to LPL and applaud his mission to make an extraordinary difference in the third act of his clients' lives. We are honored he chose to partner with LPL as he seeks new ways to elevate service experiences and build his perfect practice. At LPL, we are deeply committed to delivering robust resources, business solutions and innovative capabilities that can help all of our advisors differentiate their practice, win their markets and be successful at each stage of their business' lifecycle. We look forward to a long-lasting relationship with the entire team at Third Act Wealth Management."

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

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