



Financial Advisors Ron Clark, George Brkljacic Join LPL Financial

Mar 20, 2023

CHARLOTTE, N.C., March 20, 2023 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that Money Matters has joined LPL Financial's broker-dealer, RIA and custodial platforms. The team reported having served approximately \$250 million in advisory, brokerage and retirement plan assets*, and joins LPL from Cetera.

Founded by CEO Ron Clark, Money Matters is a financial consulting firm based in Tampa, Fla. and Gadsen, Ala. Clark partnered with fellow advisor George Brkljacic, CFP® about 17 years ago, and they are assisted by seven office support members, all who are client-centric and knowledgeable in the complexities of the financial services industry. To date, the team has served four generations of families, as well as numerous businesses, churches and charitable organizations.

"We've developed a financial coaching process to provide balanced financial solutions and strategic investment planning, one client at a time," said Clark, whose 40 years of experience and practical application enable him to make financial concepts easy to understand and implement.

Seeking innovative resources and more guided independence to serve their clients' best interests, the advisors chose to shift their business to LPL. Clark and Brkljacic researched wealth management firms for two years prior to making the move.

"In looking at firms, there were certain criteria that we looked for, from an enhanced client technology experience to ease of doing business," Brkljacic said. "We wanted a partner committed to providing resources to help and enhance our ability to serve our clients, along with our expanding practices. LPL checked every box that was important to us."

Clark added, "LPL stood out like a lighthouse calling us home. After seeing the expansive and connected tools at LPL, we felt it's a better match to serve our clients evolving needs. We appreciate that we no longer have to enter the same information multiple times. All the systems with LPL are integrated, making it much easier to do business. In turn, this allows us to devote more time for research and enhancing the service we provide to our clients."

Scott Posner, LPL Executive Vice President, Business Development, stated, "It is an honor to welcome Ron, George and the entire Money Matters team to LPL. We have a deep understanding of the marketplace and are committed to delivering exceptional advisor experiences, thus enabling advisors to deliver differentiated experiences to their clients. That has and will always be the No. 1 focus at LPL. We look forward to a long-lasting relationship with Money Matters and wish them much success with the next chapter of their business."

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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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Media Contact:

Media_relations@LPLFinancial.com

(704) 996-1840

Tracking #1-05350513