LPL Financial Welcomes One2One Wealth Strategies

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CHARLOTTE, N.C., April 13, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that One2One Wealth Strategies has joined LPL Financial's broker-dealer, RIA and custodial platforms, aligned with Mariner Advisor Network. The team reported having served approximately $400 million in advisory, brokerage and retirement plan assets*, and joins LPL from PlanMember Securities.

Based in Scottsdale, Ariz., One2One was founded in 2016 with a mission to provide fully customized investment and financial services to a wide range businesses, educators, families and individuals. Led by Founding Partners Robert Young, Gavin Jensen, and Adam Carlat, the team includes fellow advisors Austin Adams, Greg Geryak, Austin "Tex" Sigrist, Stephanie Schultz, Jeff Edwards, and George Fraunces, as well as Director of Operations Larry Brodie and support staff members Renee Smith, Donna Kuehl, Brad Kometer, Cameron Runyan and Hanna Ronningen.

"Our practice was built on hard work, best practices and a dedication to helping improve the financial needs and goals of each client," Young said. "We have a diverse team of advisors who bring their unique strengths to the practice, and we make a point to develop long-term relationships with our clients by providing high-level support and personalized advice."

Looking for enhanced capabilities, differentiated service experiences and more ways to add value to their practice and clients, the One2One team chose to partner with LPL and Mariner.

"We are incredibly customer-service oriented and very driven to provide the best client experience possible. By making this move, we will be able to elevate our service and enhance our offering by being able to work on more complex portfolios," Carlat said. "We appreciate that LPL's integrated technology has one login and an easy, user-friendly interface for our clients to access information from anywhere they want. We also look forward to tapping into the experienced investment portfolio team at Mariner. With so many new resources and support partners, we will be able to be more hands-on with our clients and focus entirely on their needs."

The team also believes the partnership with LPL opens up the door for future growth through M&A.

"We are at the golden age of being able to grow through acquisitions," Jensen said. "Many baby boomers are looking to retire or scale back their practice, but good advisors don't want to leave their clients without support. They want someone they can trust with good business smarts, as well as empathy for the situation. We can be that support and continue to add value to those meaningful relationships."

Daxs Stadjuhar, National Managing Director for Mariner Advisor Network, stated, "Mariner Advisor Network is thrilled that One2One Wealth Strategies has joined our firm and LPL Financial. One2One Wealth Strategies has a proven track record of excellence and a strong focus on the 403b space. Mariner Advisor Network is excited to offer our resources, including our portfolio consulting team and tax services, to enhance their business and help them continue to grow and thrive. With our support, One2One Wealth Strategies can focus on what they do best – helping their clients pursue their financial goals. We look forward to supporting their next growth stage and building a successful partnership together."

Scott Posner, LPL Executive Vice President, Business Development, added, "We welcome the One2One team to the LPL community and congratulate Mariner on growing its network of advisors. We are inspired by One2One's mission to take care of its clients by providing elevated experiences and innovative resources. Here at LPL, we remain steadfast in our commitment to being a long-term partner by delivering a sophisticated wealth management platform and robust business tools designed to help advisors differentiate their practice and be successful serving the needs of their clients. We look forward to a long-lasting relationship and exciting journey ahead with One2One Wealth Strategies."

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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.*

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