



LPL Financial Welcomes Financial Advisor Nate Carlon

May 3, 2023

CHARLOTTE, N.C., May 03, 2023 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisor Nate Carlon of Carlon Wealth Advisors has joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported having served approximately \$300 million in advisory, brokerage and retirement plan assets*, and joins LPL from Stifel Financial.

Based in Scottsdale, Ariz., Carlon is well-versed in many aspects of the financial landscape, having started his career in banking and then serving as a fixed income specialist before he built his wealth management practice over the past 15 years. He uses knowledge from past professional experiences to deliver personalized financial advice and investment strategies designed to help each client work toward their financial goals. Carlon Wealth Advisors also includes highly dedicated team members: Client Services Manager Lora McLaughlin and Jono Carlon, Wealth Operations Analyst and Nate's brother.

In recent years, Carlon has coined a phrase that he often shares with clients: "Life is complex, and change is real. Today's environment requires a new kind of relationship. We can help you chart a course today to pursue your tomorrow." That mission led the team to LPL Financial, where they plan to enhance their service commitment to current and future clients by utilizing innovative tools and technology and a broad platform of investment solutions.

"We want to elevate the client experience by incorporating robust technology and unique communication efforts to strengthen bonds, better educate the client and better manage goals and expectations," Carlon said. "We felt LPL provides the best flexibility and resources to help our clients navigate change. We were especially drawn to LPL's focus on driving advisor success, which in turn drives success for the clients. Additionally, LPL's integrated platform gives us the greatest amount of flexibility to build out our firm in a manner that we feel best suits our clients."

Ultimately, Carlon wants his clients to feel like they're part of something unique and special by engaging them in educational events, client appreciation events and community focused activities. "If they can understand what's going on with the market and study the reports we developed for them, and also have a little fun along the way, we believe that will give clients the best possible experience. And that's what matters most," Carlon said.

Scott Posner, LPL Executive Vice President, Business Development, stated, "We welcome Nate to the LPL community. We are proud to be his partner by delivering innovative resources and robust business solutions that can help him engage more with clients and be successful at every stage of his business' lifecycle. We will continue to leverage our scale to bring value to advisors, providing them with time-saving, integrated capabilities so they can focus on helping their clients pursue their lifelong financial goals and aspirations. We look forward to a long-lasting relationship with the entire team at Carlon Wealth Advisors."

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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.*

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. Carlon Wealth Advisors and LPL Financial are separate entities.

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