LPL Financial

LPL Financial Welcomes New Father-Son Linsco Team

May 8, 2023

CHARLOTTE, N.C., May 08, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Jeffrey Katz CIMA, and Justin Katz have joined LPL's employee advisor channel, Linsco by LPL Financial ("Linsco"), to launch their practice, Katz Wealth Advisors of LPL Financial. They reported having served approximately $210 million in advisory, brokerage and retirement plan assets*, and join LPL from Wells Fargo Advisors.

With more than 40 years of financial services experience, Jeffrey grew up intrigued by economics, market conditions, geopolitics and his own family's investment experience, spurring a lifelong passion for investing. This, combined with his desire to help guide families and individuals on a personal level as they aspire to reach their financial goals, excites him about the important work he does each day.

Justin, who was also keenly aware of economics and personal finance at a young age, started his career in the tech industry before following his father's footsteps in 2016 to help grow the practice and connect with younger generations of clients. "I've always been attracted to the idea that we can help people navigate the complexities as they work toward their financial goals," Justin said. "It's not just charts and numbers, but I really love having the ability to help people in a meaningful way with some of the most important decisions of their lives."

The father-son dynamic has been instrumental in the growth of their practice. "We communicate very well and have a really good time rolling up our sleeves to help other families solve their problems," Jeffrey said. "We think of it as a family helping other families."

They take a comprehensive approach to wealth management, first understanding each client's unique story, priorities, beliefs and long-term goals before they create highly personalized investment strategies and plans. They believe ongoing education, listening and asking the right questions are keys to success. The Katz team also includes Registered Client Service Associate Heather Cheney. They work remotely from Napa, Calif., Incline Village, NV., and Portland, Ore.

Looking to enhance the service experience for clients and take more control of their business, the Katz team turned to Linsco by LPL Financial.

"We're excited by what LPL has to offer and the dedicated support we'll receive from the Linsco team," Jeffrey said. "The flavor of every interaction we've had with LPL has been refreshing, and we truly appreciate all of the efforts that are being put into every aspect of our business—from marketing and strategy support to the service professionals. This move will help us put clients' best interest at the forefront of everything we do."

Why Linsco by LPL?
The Katz team turned to Linsco by LPL for its innovative technology and enhanced service experiences, as well as the freedom to operate with more autonomy and flexibility that will allow them to focus on what's best for their clients and business.

Linsco by LPL serves financial advisors seeking the core tenets of independence, including owning their client relationships and having flexibility to run their practice, their way. With Linsco, advisors have access to LPL's integrated wealth management platform and robust business resources, along with the additional benefits of having support from an experienced branch management team, dedicated marketing consultant, technology consultant and service team.

"Linsco is a way for us to tiptoe into independence, giving us the best of both worlds—the support and resources attached to a major firm with the ability to call our own shots and provide the boutique flavor of a standalone practice," Justin said. "This move was made with clients in mind as we build out a firm that's based on their wants and needs."

Scott Posner, LPL Executive Vice President, Business Development, stated, "We welcome Jeffrey and Justin to the Linsco community and are here to support them each step of the way as they evolve their practice on their own terms. At LPL, we understand that advisors want the freedom and flexibility to provide personalized financial guidance as they see fit. We are committed to creating differentiated experiences, both advisors and their clients, and delivering innovative resources designed to help their businesses thrive. We look forward supporting Katz Wealth Advisors for years to come."

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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.*

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