LPL Financial Welcomes Hedberg Wealth Managment

May 16, 2023

CHARLOTTE, N.C., May 16, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Jeff Hedberg and the team at Hedberg Wealth Management has joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported having served approximately $150 million in advisory, brokerage and retirement plan assets*, and joins LPL from SagePoint, part of the Advisor Group network of broker-dealers.

With registered offices in Fort Myers, Fla., and Newington, Conn., Jeff Hedberg opened Hedberg Wealth Management in 1996 with a mission of helping clients prepare for their financial future. Hedberg Wealth Management has grown to include longtime Branch Operations Manager Michelle Doffek and additional support from Devin Moore and Giuseppe (Joe) Terranova, who are working to become licensed advisors.

With more than three decades of wealth management experience, Hedberg says his company is committed to meeting clients where they are and educating them so they develop an understanding of personal finance. "No one strategy fits everyone, which is why every client gets our undivided attention – from planning to execution to follow-up. We take a proactive approach in helping our clients develop a roadmap to address their financial goals and objectives, using the most efficient methods available," Hedberg said.

It was that client-focused commitment that led Hedberg and his team to LPL.

"As our business grows, we want to ensure we are able provide each of our clients with the high level of service they have come to expect," Hedberg said. "After reviewing LPL's extensive suite of resources and capabilities, this new partnership felt like a natural fit. I've always been an entrepreneur and we appreciate that LPL supports the entrepreneurial spirit. From the firm's integrated technology platform to the ability to provide clients with differentiated experiences, we are confident this move will help ensure Hedberg Wealth Management has the tools necessary to exceed our clients' expectations."

Scott Posner, LPL Executive Vice President, Business Development, stated, "LPL Financial welcomes Jeff and his entire team to the LPL community. We appreciate their mission to put clients' best interests first, and we are committed to supporting their goals by providing them with innovative resources, integrated capabilities and access to a wide range of non-proprietary investment products. We wish Hedberg Wealth Management great 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 institution-based investment programs 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.

LPL and its affiliated companies provide financial services only from the United States.

**Value approximated based on asset and holding details provided to LPL from year-end 2022.*

Securities and advisory services offered through LPL Financial, a registered investment advisor. Member FINRA/SIPC. Hedberg Wealth Management and LPL Financial are separate entities.

Throughout this communication, the terms "financial advisors" and "advisors" are used to refer to registered representatives and/or investment advisor representatives affiliated with LPL Financial LLC.

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Media Contact:
Media.relations@LPLFinancial.com
(704) 996-1840

Tracking #1-05369503