Advisor Jonathan Kesselman Joins LPL Financial to Launch Independent Practice

May 24, 2023

CHARLOTTE, N.C., May 24, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Jonathan Kesselman CFP®, has joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported having served approximately $220 million in advisory, brokerage and retirement plan assets*, and joins LPL from UBS.

With the move, the Westlake, Ohio-based advisor is pleased to launch his new independent practice, Kesselman Wealth Management. He is joined by his wife, Rosie, who is the firm's director of business development and marketing.

Kesselman is approaching his 10th anniversary as a financial advisor, having started his career as an attorney in a private practice. He specializes in helping clients with their transition to retirement. "I take a very proactive approach to financial planning and make it a priority to truly get to know each client's financial goals and concerns," he said. "I go really deep into the planning process, focusing extensively on the transition to retirement, which includes financial planning, cash flow planning, liquidity and the mitigation of risks."

After a decade in the wirehouse environment, Kesselman decided the independent route would be the best fit for his business moving forward. With careful consideration and much due diligence, Kesselman chose to partner with LPL.

"LPL is a Fortune 500 company with robust investment and planning capabilities, and it also offers the flexibility to operate my business in the way I feel is in the best interest of my clients," he said. "LPL provides tools, technology, regulatory expertise, independent research and back-office support, allowing me to focus more time and resources on my clients and provide even greater personalized service. I'm confident that this will greatly enhance the value I can provide to clients."

Outside of work, Kesselman serves on the board of the Cleveland Zoological Society (Cleveland Metroparks Zoo) and is a member of the Estate Planning Council of Cleveland.

Scott Posner, LPL Executive Vice President, Business Development, stated, "We welcome Jonathan to the LPL community and are committed to helping him deliver meaningful experiences for his clients. We believe that advisors know their clients best, and they should be able to build a perfect practice that helps them deliver what their clients need and value. We strive to be a long-term partner to advisors, providing them with support, resources and integrated capabilities designed to help them thrive. We congratulate Jonathan on the launch of his independent practice, and we look forward to supporting his team 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 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. Kesselman 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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