Father-Son Team Joins LPL Financial to Launch Wiser Advisor Group

May 30, 2023

CHARLOTTE, N.C., May 30, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Larry Lytle, CFP®, and Zach Lytle, CEPA®, have launched an independent practice, Wiser Advisor Group, LLC ("Wiser Advisor"), and joined LPL Financial's broker-dealer, RIA and custodial platforms. The advisors reported having served approximately $130 million in advisory, brokerage and retirement plan assets* and join from RBC Wealth Management.

Based in Phoenix, Wiser Advisor was co-founded by managing partners Larry and son Zach. The father-son duo have worked together since 2018 and said their close relationship and shared passion for client success led them to start an independent practice. The advisors focus on three primary service areas: philanthropy and charitable giving, succession planning and individual wealth planning.

By design, the team maintains a modest client base of approximately 200, which gives them more time to develop hyper-focused, deep relationships. "We work with a range of clients, from families to non-profits," Zach said. "We understand each individual has unique goals and challenges and deserves A-list treatment. It's vital we give everyone the attention they deserve."

Larry and Zach take a multi-generational approach to client financial well-being, believing "two minds are better than one," Larry said. "Zach and I see things differently and by leveraging our unique perspectives, we deliver more holistic financial plans for multiple generations. It's a reflection of our father-son dynamic and close working relationship."

Why they chose LPL Financial

"Everything we do is for our clients, and we need to partner with a company as customer-centric and flexible as we are," Larry said. "LPL's open platform and adaptive technology allow us to individualize our approach to each client. We have the best tools available at our fingertips."

Zach added, "LPL gives us options to service new areas, offer enhanced advice and go deeper to prepare our clients' financial futures. Importantly, our clients will find it easier to communicate with us through digital technology like e-signatures, texting and a single, integrated platform. We can become more effective than ever before."

LPL Executive Vice President, Business Development, Scott Posner stated, "We are proud to welcome Larry and Zach to LPL Financial and are honored to be part of their journey to independence. In an increasingly challenging business environment, LPL is committed to simplifying day-to-day operations and helping financial professionals build efficient, flexible practices on their own terms. We look forward to a long-lasting relationship with Wiser Advisor and this father-son team."

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About LPL Financial
LPL Financial Holdings, Inc. (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-mediated advice 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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