LPL Financial

LPL Financial Welcomes Integrity Wealth Advisor Group

Jun 8, 2023

CHARLOTTE, N.C., June 08, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Todd Rosel, AAMS, and Larry D. Smith have joined LPL Financial's broker-dealer, RIA and custodial platforms. They reported having served approximately $310 million in advisory, brokerage and retirement plan assets*, and join LPL from Edward Jones.

With the move, the longtime friends will combine their individual practices to form a new independent firm, Integrity Wealth Advisor Group. Based in Lexington, Tenn., the team also includes client service associates Sheree Brown and Paige Griggs.

"As a firm, we have the client—and only the client—in mind," Rosel said. "Everything we do revolves around helping people organize their wealth, make smart financial decisions and work toward their goals. That might mean helping make sure their assets generate income through retirement years or passing assets to the next generation in the most efficient manner."

Smith added, "We are passionate about serving others and providing a high level of service. We understand not one strategy fits everyone, which is why each client gets our undivided attention from personalized planning to education to follow-up."

That commitment to excellence drove the team to LPL Financial, an industry leader committed to providing innovative technology solutions and differentiated service experiences designed to help advisors thrive.

"With LPL, we now have access to more cutting-edge tools and robust resources, as well as a larger investment platform that will allow us to serve clients at a higher level," Rosel said. "We're also excited about the integrated capabilities that will help us gain efficiencies in our practice."

Scott Posner, LPL Executive Vice President, Business Development, stated, "We welcome Todd, Larry and their team to the LPL community and are honored to be a chosen partner in their journey to elevate their practice and add more value to their clients. We understand what advisors need to run a successful firm, and we are committed to investing in innovative capabilities and resources necessary to help them achieve that success. We look forward to a long-lasting relationship with Integrity Wealth Advisor Group."

Related
Advisors, find an LPL business development representative near you.

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.*

Connect with Us!

https://twitter.com/lpl

https://www.linkedin.com/company/lpl-financial

https://www.facebook.com/LPLFinancialLLC

https://www.youtube.com/user/lplfinancialllc

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

Tracking #1-05371721