LPL Welcomes Florida-Based Independent Practice Van Buren Wealth Management

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CHARLOTTE, N.C., June 12, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq:LPLA) announced today that financial advisors Rodney Van Buren and Whitney Colton have joined LPL Financial's broker-dealer, RIA and custodial platforms. The advisors reported having served approximately $200 million in advisory, brokerage and retirement plan assets* and join from VALIC Financial Advisors, Inc., the broker-dealer for AIG Retirement Services.

With this move, the team has launched an independent practice, Van Buren Wealth Management, based in Melbourne, Fla. They are joined by client relations and executive support staff members Karen Savage and Nicole Wilbert, who share a passion for helping clients and their families.

Together, the Van Buren Wealth Management team believes in "out of the box" thinking, often challenging conventional approaches to investing and preserving wealth. They take a team approach to developing financial strategies, leveraging their diverse backgrounds to develop, implement and monitor strategies tailored to each client and their unique goals.

"We have the privilege to walk alongside hundreds of clients — from teachers to engineers to executives. We learn about their personal situation, dreams and goals and understand their risk tolerance," Van Buren said. "These are personal, thoughtful connections, and we expect to continue building these relationships."

Why they chose LPL Financial

After considering what's best for their growing business, the team turned to LPL in their journey to independence. They recognized the independent model provides more freedom and flexibility to build the practice on their terms, and LPL's industry-leading technology would enable them to adapt and evolve to stay competitive.

"LPL has several advanced planning programs to choose from, along with more managed money and innovative solutions to deliver better experiences for our clients," Van Buren said. "With more tools and flexibility, LPL gives us access to an elevated trading platform, as well as some of the best financial planning software and investments options available."

LPL Executive Vice President, Business Development, Scott Posner stated, "We welcome Rodney and Whitney to LPL Financial and are honored to support the launch of Van Buren Wealth Management. At LPL, we're committed to providing advisors with innovative tools and strategic business resources that enhance their practices, grow their services and foster even deeper relationships with their clients. We look forward to supporting Van Buren Wealth Management for years to come."

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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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