LPL Financial Welcomes Forte Financial Planning

Jun 14, 2023

CHARLOTTE, N.C., June 14, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Brian Olson CFP®, 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 Edward Jones.

Located in Lincolnshire, Ill., a suburb of Chicago, Olson knew from an early age that he was destined to be a financial advisor. He worked at the Chicago Board of Trade in college to gain industry experience prior to launching his career as a financial advisor in 2008.

With the move to LPL, he founded Forte Financial Planning with a mission to help people navigate the complex world of finance and invest in their future. Olson's background in institutional investing, pension administration, 401(k) management and credit data allows him to offer a diverse perspective to serve clients more holistically. He is joined by longtime Client Service Manager Mariann Rubin.

"Forte means 'strength, expertise and proficiency,' which, along with integrity, are the key themes I aspire to exude at my new independent practice," said Olson, who takes a comprehensive approach in his work to provide personalized strategic investment advice and planning for families, small business owners and high-net-worth individuals.

Olson believes the independent model allows him to put his clients' best interests first. It was important for him to partner with a leading wealth management firm that does not offer proprietary investment products, thus allowing him to provide professional and personalized advice based solely on each client's unique financial situation and goals.

"It's always been important to make sure I'm in the best position possible to serve my clients, and LPL provides me with that opportunity," he said. "LPL provides access to best-in-class, integrated technology solutions and financial planning software that will enhance the services I deliver to my clients. Ultimately, it all boiled down to the need for more autonomy to run my business on my own terms so I could have more confidence in each client's financial future."

Scott Posner, LPL Executive Vice President, Business Development, stated, "We welcome Brian to the LPL community and look forward to supporting the vision he has for his practice. The industry will continue to evolve and investors' needs and expectations change over time, and it is our goal to offer advisors the flexibility to build their perfect practice on their own terms while serving clients in meaningful ways. We are committed to providing innovative capabilities, robust business solutions and a wealth management platform advisors can rely on to address the needs of their clients both now and in the future."

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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.

Securities and advisory services offered through LPL Financial LLC ("LPL Financial"), a registered investment advisor. Member FINRA/SIPC. LPL Financial and its affiliated companies provide financial services only from the United States. Forte Financial Planning 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.

We routinely disclose information that may be important to shareholders in the "Investor Relations" or "Press Releases" section of our website.

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

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