LPL Financial Welcomes Financial Advisor Adam Legate

Jun 15, 2023

CHARLOTTE, N.C., June 15, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq:LPLA) announced today that financial advisor Adam Legate of VFG Wealth Management and Benefit Solutions has joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported having served approximately $230 million in advisory, brokerage and retirement plan assets*, and joins LPL from Royal Alliance, part of the Advisor Group network of broker-dealers.

Based in Lexington, Ky., Legate is a 20-year industry veteran who has built his career on the guiding principle that each client is unique and requires a specialized plan to help them meet specific goals and needs. He believes in cultivating long-term relationships with his clients, and many have been with his firm from day one and some are multigenerational.

VFG Wealth Management and Benefit Solutions specializes in helping individuals and small businesses with their wealth management, retirement income strategies and asset preservation needs. Adam is supported by Investment Advisor Representatives Jason Young and Kevin Kitchin, CFP®, and administrative assistant Susan Lowe.

"I firmly believe in a client-centered approach," Legate explained. "I work hard to meet my clients where they are and guide them every step of the way. Once we establish a plan, I continuously monitor, adjust and review it with each client to ensure they are on the path to success – whatever their goals might be."

It was his client-centric commitment that led Legate to LPL Financial, where he plans to use the company's innovative technology and integrated capabilities to enhance his clients' experience.

"Moving to LPL was the right choice for my business and my clients. From the service to the technology, everything is streamlined and simple to use," Legate said. "This business changes every day, and if you're not changing with it you're going to get left behind. By partnering with LPL we can ensure that our business is prepared to meet the evolving needs of our clients for years to come."

LPL Executive Vice President, Business Development, Scott Posner said, "We welcome Adam and his team to the LPL community. We applaud their client-first philosophy, and we are proud to support their mission by providing innovative technology, robust resources and strategic business solutions designed to help their practice thrive. We look forward to a long-lasting and successful relationship with VFG Wealth Management and Benefit Solutions."

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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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