LPL Financial Welcomes Financial Advisors Scott Hartman And Adam Johnston

Jun 28, 2023

The financial advisors, along with account manager Destinee Chupp, join the team at Exemplar Financial Network's Financial Partners, Inc.

CHARLOTTE, N.C., June 28, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Scott Hartman AIF®, CRC® and Adam Johnston have joined LPL Financial's broker-dealer, RIA and custodial platforms. They reported having served approximately $375 million in advisory, brokerage and retirement plan assets*, and join LPL from Cetera Investment Advisors.

Based in Elkhart County, Ind., Johnston and Hartman have been in the industry since 2004 and 2008, respectively, and have worked together for about 13 years. They are joined by licensed account manager Destinee Chupp. They take a proactive, team approach to providing comprehensive financial planning and personalized investment strategies to help clients maneuver through the complex world of financial-services.

"Our entire focus is to help take care of our clients and their families, and we do that by getting to know each person on a deeper level," Hartman said. "We understand that no one strategy fits everyone, which is why every client gets our undivided attention—from planning to execution to follow-up."

Looking to enhance their offerings and spend more time with clients, they chose to move to LPL Financial and join the team at Financial Partners, Inc., an existing firm that's part of Exemplar Financial Network.

"We had been in a bank setting, but we needed more independence and control as we take steps to expand relationships and enhance our offerings," Johnston said. "We've known Cory at Financial Partners for a while, and have been impressed with the direction of his company. As we got to know more about Exemplar and LPL, we realized they were the ideal partners to help us elevate the client service experience. We now have a family-type office with local resources, backed by LPL's innovative technology and better investment options. It's a win-win for our business and our clients."

"We at Financial Partners, Inc., are extremely happy that Scott, Adam, and Destinee have chosen to affiliate with our firm," said Financial Partners President Cory E. Marlow. "With the addition of their team, we believe we are now one of the area's most comprehensive and robust financial planning and wealth management organizations. In addition to expanding our footprint to Fort Wayne, Ind., Warsaw, Ind. and the greater Chicagoland areas, the new synergy our team delivers should make for a very bright future for both our clients and our entire organization."

Jennifer Johnson, President of Exemplar Financial Network, added, "We enthusiastically welcome Scott, Adam and Destinee to Exemplar Financial Network Enterprise. The success this team has achieved thus far in their career is impressive and we believe the affiliation with Exemplar and the integration with the Financial Partners team lead by Cory Marlow will enable them to continue on their growth trajectory while enhancing the offering of high value service to clients. We look forward to what the future has in store for these young and energetic advisors."

Scott Posner, LPL Executive Vice President, Business Development, stated, "We extend a warm welcome to Scott, Adam and Destinee and congratulate Financial Partners and Exemplar on growing their network of quality advisors. We're honored they recognized that our innovative capabilities and resources can make it easier for them to manage their practice and create differentiated experiences for their clients. We will continue leveraging our scale to offer the technology, service and other wealth management resources that deliver value and help address the evolving needs of investors. We look forward to a long-lasting relationship with the entire team at Financial Partners, as well as Exemplar Financial Network."

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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. Financial Partners, Inc., Exemplar Financial Network 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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