



Pacific Legacy Wealth Partners Launches With Support From LPL Financial

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CHARLOTTE, N.C., July 26, 2023 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) (Nasdaq:LPLA) announced today that financial advisors Terri L. Conger, CFP®, Joseph Blackner, CRPC®, CPFA™, Jace Kasteler, SE-AMWA and Trevor Lubereski, CPA have joined LPL to launch a new independent practice, [Pacific Legacy Wealth Partners](#). They chose to affiliate with LPL's supported independence model, [LPL Strategic Wealth Services](#), which enables advisors to grow their business according to their vision. The advisors reported having served approximately \$425 million in advisory and brokerage assets*, and they join LPL from Merrill Lynch.

Based in Federal Way, Wash., just north of Tacoma, Pacific Legacy Wealth Partners is led by Managing Director Terri Conger. A veteran of the financial services industry, she has more than two decades of experience. The daughter of a CPA, Conger says her love of numbers and ability to cultivate personal relationships came naturally. Over her career, Conger has built a reputation as an advisor who goes the extra mile for her clients, taking time to understand their goals, aspirations, family values and financial comfort levels to create tailored wealth management strategies. A testament to her professional and caring demeanor, Conger was recently named to the Forbes Best-In-State Women Advisors List in 2023.

Blackner, known for his ability to ask smart questions and listen intently, joined Conger about five years ago. With two retirement specialist designations, he goes beyond wealth accumulation and preservation by assisting clients in all areas of life: managing future health care expenses, planning for college, selling a business, transferring wealth to the next generation and more.

With a background in analytics, Kasteler made the leap into finance after building, designing and reporting financials for a large industry company. He relocated from Indiana to Washington in 2018 to work alongside of Conger. Kasteler, who specializes in helping sports and entertainment clients, believes financial planning is about more than just markets and returns; it's about what matters most to each client.

Rounding out the group of Founding Partners is Conger's son, Lubereski, who knew from an early age that he wanted to continue his family's legacy. He started out in accounting as a CPA before shifting to the financial services industry. By thoroughly understanding his clients' goals, risk tolerance, time horizon and liquidity needs, Lubereski connects the dots to create custom strategies that reflect who they are and where they see themselves in the future.

"We're a strong multi-generational team, with all of our different experiences and a broad range of skills," Conger said, noting the close-knit team also includes Wealth Management Associates Judi Stanton and Jennifer Hamlyn. "We are deeply committed to consistency, service and hard work. We are driven by our values and fiduciary standards based on our commitment to always act in the client's best interest."

Looking for more freedom and the ability to offer an elevated client experience, Pacific Legacy Wealth Partners chose to move to LPL.

"We wanted more control over our business and to function more as a fiduciary," Blackner said. "As a Fortune 500 company, LPL has a vast footprint within the industry along with size and scale to help us boost growth opportunities and client experiences. We now have more flexibility and autonomy to grow our business on our own terms. Additionally, since LPL doesn't offer proprietary investment products, we can truly do what we think is best for our clients."

LPL Strategic Wealth Services is designed for advisors who want to own their business, control the client experience and limit operational and business management distractions. Advisors who use Strategic Wealth have access to LPL's integrated wealth management platform, along with an added layer of ongoing strategic support for daily operations and long-term business management. They benefit from a truly integrated service that includes simplified pricing, technology and dedicated support to launch their practice at LPL. Then, after the transition is complete, Strategic Wealth teams receive ongoing operations support managed by a team of experienced professionals including a business strategist, marketing partner, CFO and administrative assistant. Advisors have one point of contact and dedicated resources, ultimately allowing them to stay focused on the needs of their clients, culture and evolution of their practice.

"As we looked around, we realized how much goes on behind the scenes in terms of business operations," Lubereski said. "It was clear that Strategic Wealth Services could help fill in the gap between being fully independent and an employee. We have a full team behind us dedicated to our success so that we can do what we do best – taking care of our clients and doing what's right for their financial futures."

Kasteler added, "We are thrilled to be able to enhance our practice and create differentiated experiences for our clients. Their happiness and financial wellbeing are what is most important."

Although wealth management is the foundation of their business, the team is also deeply committed to making a difference in the Federal Way community. The team lends time and resources to the John Volken Foundation, Make-A-Wish Foundation, church

ministries, the local zoo and several youth sports programs.

Scott Posner, LPL executive vice president, Business Development, said, "It is our honor to have Terri, Joseph, Jace and Trevor join the LPL community. We congratulate them on their new independent practice and are committed to supporting them as they embark on this exciting journey. At LPL, we constantly strive to innovate our technology and solutions to help our advisors differentiate their practice and enhance their clients' lives. Our Strategic Wealth Services platform and business resources empower advisors to grow their businesses and elevate the client experience. In addition, our advisors will have our full, personalized support every step of the way. We extend a warm welcome to the Pacific Legacy team and look forward to a long-lasting partnership."

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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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