LPL Financial

Pinnacle Private Wealth Advisors Launches With Support From LPL Financial

Jul 31, 2023

CHARLOTTE, N.C., July 31, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Matt Tabler, Mark Eberle and Mark Allison have joined LPL Financial to launch a new independent practice, Pinnacle Private Wealth Advisors. They chose to affiliate with LPL's supported independence model, LPL Strategic Wealth Services, and reported having served approximately $650 million in advisory, brokerage and retirement plan assets*. They join LPL from Morgan Stanley.

With nearly a century of combined experience, Pinnacle Private Wealth Advisors is a caring team committed to helping clients simplify their financial life, enjoy their lifestyle and secure a legacy. The advisors have worked together for several years, taking a team approach to helping high-net-worth families, entrepreneurs, executives and professionals pursue their financial aspirations. Each partner brings their unique strengths to the team, including relationship building, investment management, comprehensive financial planning, cash flow management, research, analytics and more. They are joined by four support staff members.

"We all came into this business with the goal of helping people make good choices with their money," Eberle said. "Our business is driven by personal relationships with our clients. It's so satisfying to help them with the burden of managing their wealth, taking some of the stress off their plates so they can focus more on living a more fulfilled life."

Located in the scenic Puget Sound region in Bellevue, Wash., the Pinnacle team's new office provides a spectacular view of Mt. Rainier, the state's highest peak and the inspiration for their brand. Mountains are an enduring symbol of strength, accomplishment and stability. Like most successful outcomes, ascending a mountain requires focus, determination and a deep sense of purpose — values the team shares with its clients.

Moving to LPL Strategic Wealth Services

"We have always worked for the client, not for a firm. This move to independence allows us to put our clients' needs first, without corporate influence," Tabler said. "We believe LPL is at the top of its mountain in the independent space, offering best-in-class services and more efficient processes. We have the freedom to operate on our own terms, as well as enhanced resources that will help us elevate the client experience."

The advisors were especially drawn to the LPL Strategic Wealth affiliation model, which is designed for financial advisors who want to own their business without the burden of operational and business management responsibilities. 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.

"By having a dedicated team to manage some of the business operations, we can wake up fresh every morning to focus solely on our clients," Allison said. "We want our clients to be able to feel the high-touch services and individual attention that small businesses are known for, backed by the support and tools from a Fortune 500 Company in LPL. We're here for the client and because of the client."

The team's commitment to making a difference goes beyond their professional abilities. Outside of work, the advisors support several organizations, including Make-A-Wish Foundation, Frank Lloyd Wright Foundation and St. Mary's School in Medford.

Scott Posner, LPL Executive Vice President, Business Development, stated, "We warmly welcome Matt, Mark A. and Mark E. to the LPL community and congratulate them on launching their independent practice. We remain committed to helping the Pinnacle team and all of our advisors curate the exact level of support they need to create their ideal practice. We're finding that advisors are wanting more control and autonomy; to be the CEO and have the ability to actually call the shots. LPL's Strategic Wealth Services allows advisors to do just that—to run their business on their terms and decide what's best for their clients, all while receiving comprehensive modern services and support. The Pinnacle team has built a highly successful, relationship-driven practice over the years and we look forward to supporting their next chapter as independent advisors."

Related

Advisors, find an LPL business development representative near you.

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. Pinnacle Private Wealth Advisors 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.*

Connect with Us!

https://twitter.com/lpl

https://www.linkedin.com/company/lpl-financial

https://www.facebook.com/LPLFinancialLLC

https://www.youtube.com/user/lplfinancialllc

Media Contact:
Media.relations@LPLFinancial.com
(704) 996-1840

Tracking #1-05376188