LPL Financial

Financial Advisor Brendan Wood Joins Linsco by LPL Financial

Aug 9, 2023

CHARLOTTE, N.C., Aug. 09, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Brendan Wood, CIMA®, has joined LPL's employee advisor channel, Linsco by LPL Financial, to launch Wood Wealth Management of LPL Financial. He reported having served approximately $130 million in advisory, brokerage and retirement plan assets* and joins LPL from Merrill Lynch.

Based in West Hartford, Conn., Wood is a former independent school teacher who shifted careers to wealth management in 2007. He believes the foundation to helping clients with their personal finances is open communication.

"I'm passionate about empowering clients by investing thoughtfully on their behalf and helping them understand how their money is working for them," Wood said. "Warren Buffet's teacher, Benjamin Graham, remains my greatest inspiration as a practitioner. His 'margin of safety' concept is deeply rooted in my planning and investing processes."

Wood, who lives with his family in Durham, Conn., built his practice by listening first and delivering results. He works primarily with small business owners, professionals, families and institutions, often earning referrals from CPAs and other centers of influence. His mission is simple: "Clients always come first, period."

That client-first commitment led to his decision to break away from the wirehouse environment and join LPL. He used an analogy from his teaching days to best describe the move: "There's a reason I taught in independent schools. We had smaller classes, more autonomy and I was able to shape my own curriculum. Moving to LPL is evocative of teaching in a boutique school. In public high school, you have to teach to certain tests. In independent schools, you have more freedom and flexibility. Similarly at LPL, I can put my client's best interest first."

Why he chose Linsco by LPL Financial

Linsco by LPL serves financial advisors seeking the core tenets of independence, including owning their client relationships and having flexibility to run their practice, their way. With Linsco, advisors have access to LPL's integrated wealth management platform and robust business resources, along with the additional benefits of having support from an experienced branch management team, dedicated marketing consultant, technology consultant and service team.

"The Linsco model is so unique and is a great next step for me," Wood said. "I want to be able to focus on planning, investing and service, rather than real estate, compliance and HR matters. With Linsco, I have an entire team working with me so that I can spend more time taking care of clients."

LPL Executive Vice President, Business Development, Scott Posner stated, "We welcome Brendan to the LPL community and are here to support him each step of the way as he builds his perfect practice on his terms. At LPL, we are committed to creating differentiated and compelling experiences for both advisors and their clients. We deliver innovative solutions designed to meet advisors where they are in the evolution of their practice, providing them with ultimate choice and flexibility in how they manage and evolve their business. We look forward to a long-lasting relationship with Wood Wealth Management."

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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, serving nearly 22,000 financial advisors, including advisors at approximately 1,100 enterprises and at approximately 550 registered investment advisor ("RIA") firms nationwide. We are steadfast in our commitment to the advisor-mediated 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.

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

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

Tracking #1-05376743