LPL Financial

LPL Financial Welcomes Financial Advisors Colleen Schuler and John Gibson

Aug 14, 2023

CHARLOTTE, N.C., Aug. 14, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Colleen Schuler, MBA, CFP® and John Gibson, CFP® have joined LPL Financial's broker-dealer, RIA and custodial platforms. They reported having served approximately $205 million in advisory, brokerage and retirement plan assets*, and join LPL from Fulton Financial Advisors, part of Raymond James.

Based in Anne Arundel County, Md., the seasoned advisors have worked together since 2008 and said their shared client-centric philosophy led them to launch their independent practice, Gibson Schuler Wealth Advisors, LLC. Working as a team, Schuler and Gibson cultivate long-term relationships with their clients by providing a focused and individualized approach to wealth management.

"If you don't have a financial plan, you're just guessing," said Gibson. "Our client base is made up of both pre-and post-retirees, and we make it a priority to understand each of their unique financial situations, as well as their aspirations, to help them achieve their fiscal goals."

Looking to pair their client-centered philosophy with a desire for more autonomy, the team interviewed several wealth management firms before selecting LPL Financial as the best fit for their business.

"There's a reason LPL serves nearly 22,000 financial advisors," Schuler said. "We look forward to providing our clients with a best-in-class experience thanks to LPL's streamlined and integrated technology, innovative tools and comprehensive support. Everything LPL offers confirms its commitment to taking care of advisors so we can focus on what's most important – our clients."

Scott Posner, LPL Executive Vice President, Business Development said, "We extend a warm welcome to Colleen and John and share their commitment to offer elevated service and support to their clients. At LPL, we are committed to helping businesses like Gibson Schuler Wealth Advisors provide a differentiated client experience by investing in innovative capabilities and resources necessary to help them achieve that success. We look forward to supporting Colleen and John for years to come."

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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.

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. Gibson Schuler Wealth Advisors, LLC 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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