



Financial Advisor Matthew Holbrook Joins Linsco by LPL Financial

Aug 22, 2023

CHARLOTTE, N.C., Aug. 22, 2023 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisor Matthew Holbrook, CFP®, has joined LPL's employee advisor channel, [Linsco by LPL Financial](#), to launch Coastline Wealth Advisory of LPL Financial. He reported having served approximately \$385 million in advisory, brokerage and retirement plan assets* and joins LPL from UnionBanc Investment Services, which is part of U.S. Bank.

With more than two decades of industry experience, Holbrook is driven to help his clients organize and map their financial lives so they can make informed decisions about their fiscal futures. "One of the best things about being a financial advisor is seeing the positive impact my advice can have on my clients' lives and watching them become more confident about their finances through planning and education," said Holbrook, who works primarily with business owners, healthcare professionals and executives.

When working with clients, he's often overheard saying, "The best time to plant a tree was 20 years ago. The second-best time is today." That sentiment also reflects his decision to shift business away from banking influence and take a more independent approach.

Why he chose Linsco by LPL Financial

Looking for more autonomy and flexibility, Holbrook spent more than a year researching firms before selecting Linsco by LPL Financial as this best fit for his business. With the move, he becomes the first advisor in a new Linsco office in Irvine, Calif.

"By joining LPL Financial, I am working with a firm that puts the advisor first and offers the support, technology and investment solutions necessary to run a premier practice," Holbrook said. "As a Linsco advisor, I have a more liberated way of doing business and I can provide my clients with unbiased advice in their best interests. I also have more flexibility to tailor my offerings to their individual needs and offer a wider range of investment options."

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 a great stepping stone for me as it offers a turnkey solution to build and grow my brand while offering a dedicated support team," Holbrook said. "With this move, I'm now able to provide my clients with the best possible advice and service."

Holbrook didn't have to look far for a name for his new business. Living near the ocean, he spends much of his time enjoying beach activities such as surfing and fishing. "The word 'coastline' evokes images of stability, security and peace," he said. "I'm excited to see what the future holds for my new advisory firm."

LPL Executive Vice President, Business Development, Scott Posner, stated, "We welcome Matthew to the Linsco community and are honored that he recognized LPL's ability to help him build his perfect practice. At LPL, we understand that advisors know their clients best and want the freedom and flexibility to provide personalized financial guidance and differentiated service experiences. We are committed to supporting them every step of the way with integrated capabilities, robust resources and business solutions designed to help their practice grow and thrive. We look forward to a long-lasting relationship with Coastline Wealth Advisory."

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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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