



## Financial Advisors Ed Winegar and Gregory Berg Join Linsco by LPL Financial

Sep 5, 2023

CHARLOTTE, N.C., Sept. 05, 2023 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisors Ed Winegar and Gregory Berg, CPWA®, CPFA®, CRPC™, CKA, have joined LPL's employee advisor channel, [Linsco by LPL Financial](#), to launch Winegar Berg Wealth Management Powered by LPL Financial. They reported having served approximately \$205 million in advisory, brokerage and retirement plan assets\* and join LPL from Merrill Lynch.

Located in Houston, Texas, Winegar and Berg collectively have more than five decades of experience, growing their business initially with seminars and trade shows and later through referrals. They began working together in 2000 and merged their individual practices in 2003, recognizing the team approach enabled them to tap into each other's strengths and intellectual capital. Together, the seasoned advisors offer clients a personalized approach to financial planning designed to address their specific circumstances and aspirations.

"We take the time to listen to our clients," Berg said, noting their client base is primarily a mix of high-net-worth families, business owners, attorneys, engineers and medical professionals. "It's important to understand their full financial picture – where they are and where they desire to be – in order to create comprehensive plans designed to help them realize their fiscal goals."

Looking for more autonomy, as well as the desire to enhance experiences for their clients, Winegar and Berg turned to Linsco by LPL Financial.

### Why they chose Linsco by LPL Financial

"LPL's offerings allow us to put our clients' best interests at the forefront of everything we do and will help us provide them with a truly tailored experience," Winegar said. "With this move, we can now offer clients the products and services that are the best fit for them and their long-term goals, without the constraints of forced models or reduced availability to different assets. As an added bonus, LPL's [enhanced, integrated technology](#) and strategic support will allow us to create an elevated service offering."

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.

"Ed and I have worked very hard over the years to cultivate relationships with our clients and, in many cases, we have become their most trusted advisors," Berg said. "We are confident this move to LPL will provide us the opportunity to help our clients and friends realize the goals, dreams and aspirations they have worked a lifetime to achieve."

LPL Executive Vice President, Business Development, Scott Posner, said, "We welcome Ed and Gregory to the Linsco community and are here to support them each step as they evolve their practice on their terms. At LPL, we understand that advisors want the freedom and flexibility to provide personalized financial guidance and differentiated service experiences. We are committed to supporting them 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 Winegar Berg Wealth Management."

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### About LPL Financial

LPL Financial Holdings Inc. (Nasdaq: LPLA) was founded on the principle that LPL should work for advisors and enterprises, 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 professional. At LPL, independence means that advisors and enterprise leaders have the freedom they deserve to choose the business model, services and technology resources that allow them to run a thriving business. They have the flexibility to do business *their way*. And they have the freedom to manage their client relationships, because they know their clients best. Simply put, we take care of our advisors and enterprises, 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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