Financial Advisor Aaron Cizon Joins Linsco by LPL Financial

Sep 19, 2023

CHARLOTTE, N.C., Sept. 19, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Aaron Cizon has joined LPL's employee advisor channel, Linsco by LPL Financial, to launch Cizon Group Wealth Management of LPL Financial. He reported having served approximately $175 million in advisory, brokerage and retirement plan assets* and comes to LPL from Wells Fargo Advisors. He will be the anchor tenant in a new Linsco office in Greenville, S.C.

Cizon is a 16-year industry veteran who was inspired to become a financial advisor after seeing friends and family work all their lives, only to struggle in retirement. His goal is to be a "voice of reason" to help clients invest and navigate the financial landscape. He is joined by longtime Client Services Associate Julie Willis.

"My methodology for working with clients is simple: Listen and listen some more," Cizon said. "Once I understand their personal, family and work dynamic, then we can work together on goals-based investment strategies and planning for a more successful financial future."

Looking for more freedom and flexibility in how he runs his business, Cizon turned to Linsco by LPL Financial.

"As the industry continues to evolve, it was clear that I needed more autonomy in order to take care of my clients' needs," he said. "LPL offers more choice and flexibility in how I run my business, along with the integrated tools and resources that will help us elevate the client experience."

Why Linsco by LPL Financial

The Linsco employee advisor model helps bridge the gap between working in a wirehouse environment and being independent. Linsco serves financial advisors seeking the core tenets of independence, including owning their client relationships and having the flexibility to run their practice on their own terms. 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 and other dedicated consultants.

"Linsco just made the most sense because it allows us to run our own shop while having the power of LPL behind us," he said. "It's all about the ease of doing the right kind of business for my clients."

LPL Executive Vice President, Business Development, Scott Posner said, "We extend a warm welcome to Aaron and congratulate him on the successful launch of his practice. With LPL's support, more advisors are redefining their freedom through a multitude of our affiliation models. Linsco puts the power in our advisors' hands to stay at the forefront of this era in financial advice and differentiate themselves from the competition. While Linsco advisors enjoy all the perks of being LPL employees, they are still emboldened with the autonomy to manage their practices on their own terms and put their clients' best interests first. We all look forward to supporting Cizon Group Wealth Management for years to come."

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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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