LPL Financial

LPL Financial Welcomes Vintage Financial Group

Sep 27, 2023

CHARLOTTE, N.C., Sept. 27, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Patrick "Pat" M. Ricketts, MBA, AIF®, CPWA®, CFP® and Mindy S. Helfrich, CDFA® of Vintage Financial Group have joined LPL Financial's broker-dealer, RIA and custodial platforms. They reported having served approximately $605 million in advisory, brokerage and retirement plan assets*, and join LPL from Principal Securities, Inc.

Based in Omaha, Neb., the seasoned advisors have worked together since 2012 and share a client-centric philosophy and entrepreneurial spirit. With more than four decades of combined experience, Ricketts and Helfrich have built a reputation as a team focused on developing long-term relationships with clients by providing a focused and individualized approach to wealth management. A testament to their practice, Ricketts is a member of the "Top of the Table" and Helfrich is a member of the "Court of the Table", exclusive forums for some of the world's most successful financial service professionals. Vintage Financial Group also includes vice president, Kirstin Ricketts, CFP®, who is Pat's wife, director of client operations Tricia Seitelbach-Green, director of business operations Melissa Hays, as well as their support staff.

"Our clients are never simply a name on a statement or just an account number," Ricketts said. "We take the time to get to know our clients on a deeply personal level and educate them so they can dictate what they want their financial futures to look like."

Looking for more freedom and the ability to offer an elevated client experience, Ricketts and Helfrich interviewed several wealth management firms before selecting LPL as the best fit for their business goals.

"Every interaction we've had with LPL shows that they are in the business of helping advisors focus on their clients," Helfrich said. "From their streamlined and integrated technology and cutting-edge solutions to their comprehensive support, we believe partnering with LPL will allow us to be nimble in this ever-changing industry and provide our clients with best-in-class experiences."

Scott Posner, LPL Executive Vice President, Business Development said, "We welcome Pat, Mindy and the entire Vintage Financial Group team to the LPL community. We are inspired by their client-centric commitment and individualized approach to helping their clients work toward their financial goals, and we share their dedication to offer elevated service and support to their clients. We look forward to a long and successful partnership with Vintage Financial Group."

Related

Advisors, find an LPL business development representative near you.

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.

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

Connect with Us!

https://twitter.com/lpl

https://www.linkedin.com/company/lpl-financial https://www.facebook.com/LPLFinancialLLC

https://www.youtube.com/user/lplfinancialllc

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

Tracking #479570