LPL Financial

Father-Daughter Financial Advisors Joe And Jamie Bryant Join Linsco By LPL Financial

Oct 3, 2023

CHARLOTTE, N.C., Oct. 03, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that father and daughter financial advisors Joe Bryant and Jamie Bryant have joined LPL's employee advisor channel, Linsco by LPL Financial, to launch Winner's Circle Wealth Management of LPL Financial. They reported having served approximately $125 million in advisory, brokerage and retirement plan assets* and join LPL from Robert W. Baird & Co.

Based in Lexington, Ky., Joe is a seasoned advisor with nearly 44 years of experience helping clients grow their wealth as they work toward financial confidence. Jamie, who initially started her career in sales and marketing, joined her father in 2013, bringing a different perspective and new ideas to the practice. Rounding out the family team is Joe's wife, Robin Bryant, who serves as client services associate.

"It has been so rewarding to work alongside my father as we aspire to make a real difference in our clients' lives," Jamie said, noting they serve a diverse client base of multigenerational families, business owners and professionals. "We truly enjoy listening to our clients share their goals and putting them on a path to help them get there."

Looking to elevate the client service experience and to gain more control over their business, the team turned to Linsco by LPL Financial.

"Through our extensive due diligence process, it became obvious that LPL has the resources to better position our firm for the future," Joe said. "It was time for us to be more independent and have the freedom to operate on our own terms and do what we want, which is to be more of a fee-based business."

Why they chose Linsco by LPL Financial

The advisors appreciate the additional layer of support provided by Linsco, which 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.

"We're here to help our clients make money, build their wealth and retire comfortably, not be bogged down by spreadsheets and other busy work. Linsco will help make our lives much less complicated so that we can stay focused on taking care of our clients," Jamie said.

LPL Executive Vice President, Business Development, Scott Posner said, "We welcome Joe and Jamie to the Linsco community and congratulate them on this next exciting chapter of their business. We are committed to supporting them with innovative business solutions and integrated capabilities that provide choice and flexibility in how they serve clients and grow their business on their own terms. We look forward to a long-lasting relationship with Winner's Circle Wealth Management and wish them great success in the 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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