LPL Financial

Sides Wealth Advisory Group Launches With LPL Financial Strategic Wealth Services

Oct 10, 2023

CHARLOTTE, N.C., Oct. 10, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Brock Hively, CFP®, CPFA®, AIF®, Josh Smeltzer, PPC, AIF®, Aaron Gingrich, CPFA®, AIF®, and Emily Sides, CPFA®, AIF® have joined LPL Financial to launch a new independent practice, Sides Wealth Advisory Group. They chose to affiliate with LPL's supported independence model, LPL Strategic Wealth Services, and reported having served approximately $900 million in advisory, brokerage and retirement plan assets*. They join LPL from RBC.

Now one of York, Pa.'s leading financial advisory firms, the practice was founded by Scott Sides in 1987. He steadily built the team over the years, partnering with advisors who shared his commitment to improving their clients' lives. Now, the entire team is committed to continuing Scott's legacy and building on his vision for the practice.

"At Sides Wealth Advisory Group, honesty and integrity are our guiding principles," said Hively, whose areas of focus include comprehensive wealth management, investment research and asset allocation. "We strive to be transparent, keep it simple and call things as we see them—and always with compassion. It's an approach that earns our clients' respect and helps us build partnerships that span generations."

Looking for more control and ownership of their business, as well as the flexibility to provide more customized support, the team turned to LPL Strategic Wealth Services.

"We all share an entrepreneurial mindset and recognize the value of owning our business," Smeltzer said. "By moving to LPL, we have the freedom to design and build our firm on our own terms, where clients' best interests are always first."

Sides added, "We look forward to tapping into LPL's innovative tools and resources to create differentiated experiences as we deepen existing client relationships and develop new ones. We're excited to have more flexibility and take a more personal approach."

Moving to LPL Strategic Wealth Services

The team appreciates the added layer of resources provided by LPL Strategic Wealth Services, which is designed for financial advisors who want to own their business without the burden of operational and business management responsibilities.

Advisors who use Strategic Wealth have access to LPL's integrated wealth management platform, along with an added layer of ongoing strategic support for daily operations and long-term business management. They benefit from a truly integrated service that includes simplified pricing, technology and dedicated support to launch their practice at LPL. Then, after the transition is complete, Strategic Wealth teams receive ongoing operations support managed by a team of experienced professionals including a business strategist, marketing partner, CFO and administrative assistant. Advisors have one point of contact and dedicated resources, ultimately allowing them to stay focused on the needs of their clients, culture and the evolution of their practice.

"We all see the value of owning our business, but we understand the best use of our time is with our clients," Gingrich said. "With Strategic Wealth Services, we're in control of our practice, and can leverage the support and resources we need to help us serve our clients and continue to grow."

Outside of work, the team is heavily involved in the community. Hively is a current member and past President of the Executive Referral Network. Smeltzer serves on the board of Leadership York and is a past co-chair of the South Central Pennsylvania Board of the American Heart Association. Gingrich serves on the Board and Finance Committee for the Horn Farm Center and is a volunteer with the Junior Achievement of South Central Pennsylvania. Sides is a member of the Women in Pensions Network.

Scott Posner, LPL Executive Vice President, Business Development, stated, "We welcome Brock, Josh, Aaron and Emily to the LPL community and are inspired by their mission to continue Scott's legacy as they create an independent practice where clients come first. We are committed to being their long-term partner, delivering a sophisticated wealth management platform and robust business resources to help them differentiate their practice. We're proud to stand side-by-side with the Sides Wealth Advisory Group team as they begin this exciting new journey with LPL."

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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.

Securities and Advisory services offered through LPL Financial LLC ("LPL Financial"), a registered investment advisor. Member FINRA/SIPC. LPL Financial and its affiliated companies provide financial services only from the United States. Sides Wealth Advisory Group and LPL Financial are separate entities.

Throughout this communication, the terms “financial advisors” and “advisors” are used to refer to registered representatives and/or investment advisor representatives affiliated with LPL Financial.

We routinely disclose information that may be important to shareholders in the "Investor Relations" or "Press Releases" section of our website.

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

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