



## Financial Advisors Jared West and Sandy Brown are 50th Team to Join Linsco by LPL Financial

Oct 11, 2023

CHARLOTTE, N.C., Oct. 11, 2023 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisors Jared West CFP®, CPM® and Sandy Brown have joined LPL's employee advisor channel, [Linsco by LPL Financial](#), to launch West Wealth Advisory Powered by LPL Financial. They reported having served approximately \$390 million in advisory, brokerage and retirement plan assets\* and come to LPL from Merrill Lynch.

With the move, they become the 50<sup>th</sup> recruited team to join LPL's highly attractive Linsco platform, which recruited its first advisor into the channel in early 2021. Linsco continues to rapidly expand its geographic footprint across the nation, as West and Brown become anchor tenants in Linsco's new Fresno, Calif., office.

With nearly 25 years of industry experience, West grew his career by getting to know clients personally and helping multi-generational families work toward financial confidence. He teamed up with Brown in 2017, and together they serve high-net-worth individuals and business owners. They are joined by client services associates Samantha Medeiros and Rachel Schwendiman.

"We recognize that each client is in a different stage of life and has their own unique financial goals," West said. "Before providing financial advice or guidance, we take time to understand each person's current financial situation, financial goals, risk tolerance, time horizon and liquidity needs. We take all that into account and then develop a personalized financial approach designed to help clients pursue what matters most."

After the dramatic downturn in both the stock and bond markets in 2022, the team recognized the need for more flexibility of financial solutions. After an extensive due diligence process, the team turned to LPL for the next chapter of their business.

"Moving to LPL opens the door for our clients to have access to the products and strategies that make the most sense for them, without restrictions on investments or influence from bank mandates," West said. "This move is really about freedom for clients and doing the right thing for them. I'm excited to only work for my clients' best interests."

### Why Linsco by LPL Financial

The team touted LPL's reputation and size as factors that played into their decision to move, as well as the Linsco employee advisor model that 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 is unique because it takes care of all of the overhead work so I can focus on what I've always done, which is taking care of my clients," West said.

LPL Executive Vice President, Business Development, Scott Posner said, "We are incredibly honored to welcome Jared and Sandy to the Linsco community as our 50<sup>th</sup> Linsco team and to support them as they create differentiated experiences for their clients and operate on their own terms. As always, we are committed to delivering strategic solutions designed to meet independently-minded advisors where they are in designing the vision of their perfect practice, providing them with choice and flexibility in how they manage and evolve their business. We look forward to a long-lasting relationship with West Wealth Advisory."

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### About LPL Financial

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

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