LPL Financial

LPL Financial Welcomes Financial Advisor Kane Vines

Nov 14, 2023

CHARLOTTE, N.C., Nov. 14, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Kane Vines, CFP®, CRPC®, APMA has joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported having served approximately $115 million in advisory, brokerage and retirement plan assets*, and joins LPL from Ameriprise.

With the move, Vines launches Expound Wealth Management, an independent financial practice based in Plano, Texas. Vines, who has more than two decades of wealth management experience, says his interest in financial planning started in elementary school when he attended a specialized summer program that had an elective on stock market investing. After college, Vines moved to California where he planned to work in the entertainment industry, but was called back to Texas where he got his first job in the wealth management industry. During his career, Vines has built a reputation as an advisor focused on cultivating long-term relationships with his clients by providing a focused and education-based approach to wealth management.

"When it comes to their finances, my clients are the CEO and I'm the CFO," Vines said. "It's really important to me that they have a clear understanding of their financial goals and objectives and the education necessary to take an active role in the financial planning process."

Looking to elevate his clients' experience along with his desire to move to independence, Vines said LPL was the clear standout as the best fit for his business and his goals.

"There's a reason LPL is the largest independent wealth management firm in the United States**," he said. "Everything LPL offers, from their open architecture and robust trading platform to their comprehensive support shows they are on the side of the advisor. I am confident that this move to LPL will allow me to offer a best-in-class experience for my clients."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Kane to the LPL community and are honored to support the launch of Expound Wealth Management. At LPL, we understand the desire to provide an elevated client experience and we are committed to investing in innovative capabilities and resources necessary for advisors to provide a next-level experience. We look forward to supporting Expound 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 the firm should work for the advisor, and not the other way around. Today, LPL is a leader in the markets we serve, serving more than 22,000 financial advisors, including advisors at approximately 1,100 enterprises and at approximately 560 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.

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. Expound Wealth Management 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.*

***As reported by Financial Planning Magazine, 1996-2022, based on total revenue.*

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