LPL Financial

LPL Financial Welcomes Best Wealth Management

Dec 18, 2023

SAN DIEGO, Dec. 18, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Matthew Best and Michael Moore of Best Wealth Management have joined LPL Financial's broker-dealer, RIA and custodial platforms. The team reported having served approximately $130 million in advisory, brokerage and retirement plan assets*, and joins LPL from Ameriprise.

Based in Shippenville, Penn., Best is a former educator who joined the financial services industry nearly 25 years ago to blend his passion for family values with financial analysis. Over the years, he's gained a reputation for his unwavering commitment and holistic experience in wealth management. Moore joined Best Wealth Management in 2018 after a 20-year career as a teacher and principal. He wanted to help people manage their money in ways they didn't even know existed, helping them safely navigate financial uncertainties. They are joined by Office Assistant Drew Wrhen.

"At Best Wealth Management, we believe that understanding finances should be empowering, not intimidating," Best said. "This is precisely what we've built our foundation on — a seamless blend of advice and personalized attention for each client. We don't just crunch numbers; we actually take the time to understand the stories behind them."

The team turned to LPL after a year-long due diligence process.

"We appreciate that LPL does not offer any proprietary investment products and gives us the flexibility to run our practice how we see fit," Best said. "With LPL, we also have access to a much wider range of products, tools and resources to help us differentiate ourselves from others in the market. We'll be able to elevate the service experience for our clients and truly do what's in their best interest."

Scott Posner, LPL Executive Vice President, Business Development, stated, "We welcome Matthew, Michael and Drew to LPL and look forward to supporting the next chapter of their business. Our only focus is advisors and supporting their success at every step, from personalized onboarding support to helping them grow their practice as the advice landscape changes and their clients' needs evolve. We will continue to invest in the capabilities and solutions that will help Best Wealth Management—and all our advisors—work toward the goals they set for themselves and their clients."

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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 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 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.

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

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