LPL Financial Welcomes Equity Design Group

Feb 6, 2024

SAN DIEGO, Feb. 06, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Jason Hohenstein, AIF®, Kevin Snow, CFP®, and William Zoromski of Equity Design Group have joined LPL Financial's broker-dealer, RIA and custodial platforms. The team reported having served approximately $520 million in advisory, brokerage and retirement plan assets*, and join LPL from Osaic.

Established in Wausau, Wis., the three co-founders have more than nine decades of combined financial services experience between them. They launched Equity Design Group in 1997 with the goal of providing clients with the tailored financial strategies, fiscal education and personal service to help them design their own financial futures.

"We have found that in order to be effective, financial planning needs to be coordinated – each piece needs to accomplish its own specific tasks as well as support the tasks of each other piece," Hohenstein said. "We call this life-integrated financial planning. We look at our clients' entire financial picture and help them fit the pieces together properly to help them meet their fiscal goals and objectives."

Looking to streamline business efficiencies and elevate their client experience, Equity Design Group – which also includes seven additional financial advisors and a robust support staff – turned to LPL Financial.

"From our first meeting, we felt the sincerity of LPL's approach and really got the sense that the company is constantly looking for ways to help us serve our clients better," Hohenstein said. "We were also impressed by LPL's technology and integrated business solutions which will help us improve efficiencies. We are confident that partnering with LPL will allow us the freedom and independence to run our practice on our own terms, with no influence from proprietary products – allowing us to keep our clients' best interest in mind."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Jason, Kevin, Bill and the rest of the Equity Design Group team to the LPL community and look forward to helping them grow their business and serve their clients their way. At LPL, we recognize the drive and dedication required to operate a thriving practice, and we are honored to provide this team with cutting-edge technology and business solutions to allow them to design a more robust and elevated experience for their clients. We look forward to helping Equity Design Group create their perfect practice for 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 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 mid-2023.*

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