LPL Financial

LPL Financial Welcomes Bice Wealth Management

Feb 21, 2024

SAN DIEGO, Feb. 21, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq:LPLA) announced today that financial advisor Cubby Bice MBA, AAMS, CRPC has joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported serving approximately $130 million in advisory, brokerage and retirement plan assets* and joins LPL from Osaic.

Based in Mooresville, N.C., Bice Wealth Management is an independent financial firm committed to helping clients pursue their financial goals. With 25 years of industry experience, Bice has become known for creating comprehensive investment strategies and plans designed to help clients live richer, more fulfilled lives. He is joined by Office Manager Matt Bice, his brother, and two office support members.

"I've always wanted to do something meaningful with my career, which is helping my clients choose how and when to spend their time and money," Bice said. "In doing so, I want to help my clients check off their bucket list items and build an incredible memory book."

Looking for more investment options, enhanced technology and the freedom to build his practice on his own terms, Bice turned to LPL. He interviewed 12 firms before deciding LPL would be the best fit for his business.

"We have a true competitive advantage moving to LPL, a publicly traded Fortune 500 Company that offers integrated best-in-class technology experiences and an upgrade in service," Bice said. "We appreciate the autonomy we now have to operate as we see fit. We also look forward to improvements in how we communicate with clients and how they access their account information."

Scott Posner, LPL Executive Vice President, Business Development, stated, "We welcome Cubby to the LPL community. We appreciate that he seeks new ways to provide differentiated experiences for his clients. As Cubby builds out his ideal practice, we will continue to invest in technology, business solutions and our innovative wealth management platform to help LPL advisors such as him run efficient businesses and deliver enhanced value to their clients. We look forward to a long-lasting relationship with Bice Wealth Management."

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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 570 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. Bice 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 end of year, 2023.*

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