LPL Financial Welcomes Endeavor Wealth Strategies

Feb 29, 2024

SAN DIEGO, Feb. 29, 2024 (GLOBE NEWSWIRE) -- [LPL Financial LLC] announced today that financial advisor Seth Marshall and the team at Endeavor Wealth Strategies have joined LPL Financial's broker-dealer, RIA and custodial platforms, aligned with Exemplar Financial Network. The Endeavor team reported serving approximately $515 million in advisory assets* and joins LPL from PNC Private Bank Trust.

Marshall, who served in the U.S. Marine Corps from 1995 to 2004, celebrates his 20th year in the financial services industry this year. He built his Fort Wayne, Ind., practice by delivering complex financial solutions and investment strategies for high-net-worth and ultra-high-net-worth individuals and families, always going the extra mile to provide personalized, white glove services.

Outside of work, Marshall is highly active in the community. He is a former councilman for the city of Huntington, a member of the Huntington County Economic Development organization and a board member of Junior Achievement in Huntington and Pathfinders Services.

Returning to LPL Financial

In recent years, Marshall recognized the need for more specialized resources to address his clients' sophisticated and complex needs. After a rigorous due diligence process, Marshall decided to return to LPL to build his ideal practice to serve wealthy families with a more boutique feel. LPL currently serves $130 billion in high-net-worth AUM and has developed high-net-worth-specialized resources and solutions over the years that advisors can draw on to support the needs of their most complex and sophisticated clients.

"LPL has evolved significantly over the last few years into an advisor-centric culture that provides ultimate flexibility and choice in how we grow our business," Marshall said. "With LPL's innovative capabilities and strategic resources, coupled with localized support from Exemplar, we are excited to deliver for our clients in Northern Indiana using a full complement of professional services for all their wealth management and planning needs. We are fully committed to elevating our service offering and giving clients the one-on-one attention and detail they deserve."

Dave Hubbard, Founder, Exemplar Financial Network, said, "On behalf of the entire team at Exemplar Financial Network, we are thrilled to welcome Seth to the organization. We feel his experience in leading teams, developing strategy and helping clients achieve their life's goals will be an asset as we head into 2024."

Scott Posner, LPL Executive Vice President, Business Development, added, "We welcome Seth and the Endeavor team to the LPL community and congratulate Exemplar on growing its network in the Fort Wayne area. At LPL, we understand that advisors are looking for sophisticated resources and autonomy to build their perfect practice. That's why we have invested in building our innovative open-architecture platform and high-net-worth capabilities in areas like advanced estate and philanthropy planning, income tax strategy, trustee services, a robust alternative investment platform, banking and lending solutions and complex life insurance planning. We look forward to supporting Endeavor Wealth Strategies 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 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.

our website.

**Value approximated based on asset and holding details provided to LPL from end of year, 2023.*

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Media Contact:
Media.relations@LPLFinancial.com
(704) 996-1840

Tracking #539803