LPL Financial Welcomes Aero Capital

Mar 6, 2024

SAN DIEGO, March 06, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Brice Lowe CFP®, CPWA and Bradley Moser CFP®, have joined LPL Financial's broker-dealer, RIA and custodial platforms, aligned with Mariner Advisor Network. They reported having served approximately $150 million in advisory, brokerage and retirement plan assets* and join LPL from Stifel Financial.

Based in downtown Wichita – the "Air Capital of the World" – the advisors are native Kansans with a deep connection to their community. Moser came from a fifth-generation farming family, and early on, recognized the need to effectively manage finances and build wealth. Lowe, Moser's stepson, chose to follow the same path into the financial services industry, first interning with Moser during college and later as partner in what would become Aero Capital. Together, they specialize in serving affluent families, business owners and private family foundations by providing comprehensive wealth management services such as wealth planning, asset management, tax-advantaged investment strategies, estate planning review services and charitable giving strategies.

"The next logical step for our business was to launch our new firm, Aero Capital, by partnering with LPL," Lowe said. "It's our goal to leverage our experience, designations and industry knowledge to help clients map out a customized, coordinated 'flight plan' to help them work toward their destination: a lifetime of financial freedom."

The move to LPL gives the Aero team more flexibility to build a more boutique firm so they can serve clients' comprehensive financial needs, beyond investments. The advisors said LPL provides more sophisticated resources and specialists, especially in the areas of high-net-worth and financial planning.

"We wanted to take control of our business, expand our offerings and grow our practice into something bigger," Lowe said. "We believe the new tools and resources make us more competitive to earn new business and attract new clients, but also recruit other advisors with successful practices. With LPL's robust platform combined with localized support from Mariner, it seemed to be a win-win for our business and clients."

Jen Hanau, national managing director of Mariner Advisor Network, said, "We are excited to welcome Brice and Brad to the Mariner Independent Advisor Network family to help them grow their business. By leveraging the thought leadership and diverse resources of an experienced team, including specialists focused on portfolio construction, investment solutions and various advisor solutions, advisors can have more time to focus on helping their clients build their wealth."

Scott Posner, LPL Executive Vice President, Business Development, added, "We welcome Brice and Brad to the LPL community and congratulate them on the launch of Aero Capital. As advisors continue to stay innovative and agile, LPL empowers their ability to scale their service and business goals. When advisors are afforded freedom to choose their product platform, branding, client service model and business solutions, they can give clients the personalized and differentiated experiences they deserve. We look forward to a long-lasting relationship with the entire Aero Capital team."

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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 institutions, 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 institutions 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 institution 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 institutions, 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. Aero Capital 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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