LPL Financial Welcomes Advisor Brian Pflaum

Mar 12, 2024

SAN DIEGO, March 12, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Brian M. Pflaum, MBA has joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported serving approximately $345 million in advisory, brokerage and retirement plan assets* and joins LPL from Lincoln Financial Advisors.

Based in Birmingham, Ala., Pflaum has provided investment strategies, personalized planning and wealth management for high-net-worth individuals, business owners and corporate clients in the 401(k) space since 1998. His goal is to help clients understand complex financial issues by delivering clear strategies and personal service.

After discovering his firm would be acquired, Pflaum decided to survey the marketplace to find the best wealth management partner to support his clients' evolving needs. He turned to LPL for the next chapter of his business and rebranded his practice as TPG Private Wealth.

"With LPL, I have a partner with scale; one that is committed to investing in innovative solutions that will benefit both my practice and clients," Pflaum said. "Now, I have access to an even broader range of products, a best-in-class technology offering and enhanced research capabilities. Moreover, I also look forward to being part of a larger advisor community to share ideas and grow my network."

Scott Posner, LPL Executive Vice President, Business Development, stated, "We warmly welcome Brian to the LPL community and are honored to support his evolving business. We are committed to meeting advisors where they are in the evolution of their practice to provide them with differentiated tools and integrated capabilities that help them deliver meaningful, customized services to their clients. We look forward to a long-lasting relationship with TPG Private Wealth."

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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. TPG Private Wealth 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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