Grafton Wealth Advisors launches with support from LPL Strategic Wealth Services

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SAN DIEGO, March 25, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Sarah Grafton, William “Will” Grafton IV, CFP®, CEPA® and Dexter Grafton, CPFA™, CFA® have launched a new independent practiceGrafton Wealth Advisors, through affiliation with LPL Financial’s supported independence model, LPL Strategic Wealth Services. They reported having served approximately $580 million in advisory, brokerage and retirement plan assets* and join LPL from Merrill Lynch.

Based in Winter Park, Fla., the three siblings are proud to continue the legacy of their father, William “Bill” Grafton III, who started the family business in 1972. While together they form a formidable team, each sibling advisor brings unique passions and experiences to the team to help every client feel more confident with their financial well-being. Rounding out the group, which was named a 2024 *Forbes* Best in State Wealth Management Team, are client relationship managers Tanya Carroll, AAMS™ and Percy Canteenwalla.

“With our family dynamic and service-oriented team, we put clients at the center of everything we do and take a proactive approach to give them the best possible experiences and results,” Sarah said. “We take the time to listen, educate and adjust to help clients understand our recommendations as we guide them through the ever-changing market dynamics.”

Looking for more control over how they operate, as well as the ability to elevate client experiences, the team decided to find a new wealth management partner. They chose LPL because the Strategic Wealth Services offering provides them with the greatest flexibility and choice to build a boutique practice with a concierge service model.

The Grafton team works with several high-net-worth (HNW) multigenerational families and business owners, so it was also important to partner with a firm that offers dedicated HNW resources and customized solutions to support more complex situations, such as advanced estate and philanthropy planning, income tax strategy, trustee services, a robust alternative investment platform, banking and lending solutions and complex life insurance planning.

“This move puts us in a better position to provide highly customized strategies and independent financial advice in our clients’ best interests, outside of corporate pressure,” Dexter said. “LPL provides the confidence and scale as a leading wealth management firm that we know our clients value, as well as an additional layer of personalized, sophisticated support to help us focus on what’s most important: our relationship with clients.”

“We are thrilled to continue the Grafton Wealth legacy by prioritizing our clients’ needs above all else. Their success remains our driving force, guiding every decision and action we take,” Will said. “LPL Financial empowers us to best serve our clients with flexibility to tailor our services to meet each client's unique financial goals and aspirations, ensuring their success remains our top priority."

Not wanting to face all the hurdles of entrepreneurship alone, the team chose to affiliate via LPL’s comprehensive supported independence solution, LPL Strategic Wealth Services (SW). In addition to having access to LPL’s innovative wealth management platform and sophisticated resources, SW advisors benefit from a truly integrated service that includes simplified pricing, technology and dedicated support to launch their practice. Then, after the transition is complete, teams receive ongoing operations support managed by their team of experienced professionals including a business strategist, marketing partner, CFO and administrative assistant. Advisors have one point of contact, a dedicated team and priority access to advocacy and project management for complex business issues, ultimately allowing them to stay focused on the enduring needs of their clients and the culture and evolution of their practice.

Outside of work, the team is deeply committed to giving back to the community and country. Bill's U.S. Army service and Percy's U.S. Marine Corps background instilled in them a profound sense of duty and service. The team carries that ethos into their business, where every client interaction reflects their commitment to serving with honor, integrity and dedication.

Sarah was recognized by Barack Obama and Donald Trump with the 2016 and 2017 United States Presidential Service Award. She was also the first woman recipient of *I-4 Business Magazine’s* “Leader of the Year” in the field of Business Services and has been recognized multiple times by *Orlando Business Journal*. The team actively supports numerous charitable organizations including TeamUp, Advent Health Winter Park, the Park Avenue District, Runway to Hope, Make-A-Wish Rollins College Hamilton Holt School, Albin Polasek Art & Sculpture Garden, Mennello Museum of Arts, Base Camp Children’s Cancer Foundation, Winter Park History Museum and Winter Park Day Nursery.

Scott Posner, LPL Executive Vice President, Business Development, stated, “We welcome Sarah, Will, Dex and their team to the LPL community and are proud to be their chosen partner as they take the next step to continue Bill’s legacy. LPL Strategic Wealth Services offers unprecedented flexibility to help advisors build an ideal practice that suits their unique business needs. And we will be there for each step of the way — from planning to transition to ongoing business support. We look forward to a long-lasting partnership with the entire team at Grafton Wealth Advisors and are excited about what’s in store for this 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.

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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