LPL Financial Welcomes Advisor Matthew Edwards

Apr 2, 2024

SAN DIEGO, April 02, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Matthew Edwards has joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported serving approximately $210 million in advisory, brokerage and retirement plan assets* and joins LPL from Ameriprise.

Based in Sarasota, Fla., Edwards started his career in 1999 as an intern at his prior practice, working his way up through various roles before becoming a financial advisor. With a focus on multigenerational planning and the LGBTQ+ community, he steadily built his network and client base to a point where he decided to start his own business.

"I want to provide my clients with a smaller, more boutique-type office where they receive personalized investment strategies and comprehensive financial planning, which is the cornerstone for everything we do," said Edwards, who is supported by two office staff members.

After a thorough due diligence process, Edwards turned to LPL to start the next chapter of his career.

"From a cultural perspective, LPL was absolutely the best fit. It offers true independence and a rich mix of support, along with the flexibility to build my business the way I want," Edwards said. "I appreciate LPL's open architecture, customizable solutions and innovative capabilities to help me address my clients' evolving financial needs and provide the differentiated experiences they deserve."

Outside of work, Edwards is deeply committed to giving back and being active in the LGBTQ+ community. He is a volunteer for Equity Florida, a steering committee member of its annual fundraiser and also volunteers with his local food bank.

Scott Posner, LPL Executive Vice President, Business Development, stated, "We welcome Matt to the LPL community and are honored he turned to us to help elevate his new practice. With our vertically integrated business model where everything functions in one ecosystem, we can provide enhanced experiences to advisors at scale, build differentiated capabilities and reduce costs for clients, which helps set them apart in a competitive environment. We are committed to being a long-term partner for Matt and look forward to supporting his team 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 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.

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

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