



MG Partners Private Wealth launches with support from LPL Strategic Wealth Services

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SAN DIEGO, April 04, 2024 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisors Christopher "Noah" Geoghegan, CTFA, and Tomohiko "Tom" Minami, CFP®, CFA®, have launched a new independent practice, MG Partners Private Wealth, through affiliation with LPL Financial's supported independence model, [LPL Strategic Wealth Services](#). They reported having served approximately \$435 million in advisory, brokerage and retirement plan assets* and join LPL from Truist.

With more than 50 years of combined experience in the high-net-worth space, Geoghegan and Minami have honed their unique experiences to develop a deep understanding of the complexities of wealth management. Based in Hickory, N.C., the advisors have worked together for nearly two decades to provide sophisticated investment and planning services with a personalized touch. They are joined by Director of Client Relations Caroline Montgomery.

"We're a full-service private wealth practice that caters to our clients' comprehensive financial needs — from investment management to estate planning to philanthropy and everything in between," Geoghegan said, noting they primarily serve high-net-worth (HNW) entrepreneurs and clients who have built generational wealth. "We treat our clients like family. We want to know about their wishes and goals, their children, their lifestyle and what makes them tick. We then work directly with professionals in tax or legal fields to ensure all aspects of their financial lives are covered and the right strategy is implemented."

Geoghegan's and Minami's shared passion for entrepreneurship runs deep, as it has been a part of both families for generations. It was a natural next step for them to move to independence for the next chapter of their business.

"It's the American Dream to own your business, and LPL is helping us make that dream true," Minami said. "By going independent, we can be more than just financial advisors. We are entrepreneurs who understand the journey of building and growing wealth, and we can do that in a way that puts clients at the center of every decision we make."

The team was drawn to LPL's comprehensive supported independence solution, LPL Strategic Wealth Services (SW), which combines the freedom and flexibility of entrepreneurship with hands-on business services and support to help practices thrive, both operationally and strategically. 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, SW 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.

The team also will tap into LPL's 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.

"During our due diligence process, it became clear that LPL's integrated technology and in-house resources are second to none," Minami said. "The Strategic Wealth model spoke to us because we refused to compromise for our clients. It gives us a dynamic team by our side to support our strategy and goals, allowing us to spend more time with clients."

The advisors look forward to growing their team with additional advisors and expanding their footprint within the community.

Scott Posner, LPL Executive Vice President, Business Development, stated, "We warmly welcome Noah and Tom into the LPL community and congratulate them on this next step in their journey to differentiate themselves in the marketplace. We support their entrepreneurial spirit by providing innovative capabilities and robust resources designed to help their business thrive, both operationally and strategically. We look forward to a long-lasting relationship with MG Partners Private Wealth and wish them great success."

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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.

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

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