LPL Financial

# LPL and Momentum Wealth Partners Welcome Sussex Wealth Partners

Apr 23, 2024

SAN DIEGO, April 23, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Chris Mukoda, Brad Travis, Jr., CFP®, and David Crouse have joined LPL Financial's broker-dealer, RIA and custodial platforms, aligning with Momentum Wealth Partners, an existing firm supporting LPL-affiliated advisors. They reported serving approximately $415 million in advisory, brokerage and retirement plan assets*, and join LPL from PNC Investments.

With the move, the team – which shares more than 75 years of combined financial services experience – launches Sussex Wealth Partners, an independent financial practice based in the Sussex County town of Lewes, Del. The new practice, located inside a former art gallery, was designed by the team's partner and office manager, Natalie Fowler, and brought to life by her husband, Anthony. The space gives an elevated and intimate feel – much like the experience the Sussex Wealth team strives to offer its wide variety of clients.

“Our clients range from farmers, professionals, retirees and regular working people, and our goal is to provide each of them with a personal and tailored experience designed to help them meet their financial objectives,” Mukoda said. “We take the time to get to know our clients on a deeply personal level so we can best guide them on their fiscal journey.”

Looking to pair their client-centered philosophy with the desire to provide their clients with an elevated experience, the team spent more than a year researching firms and doing their due diligence before selecting LPL and Momentum as the best fit for their business goals.

“I had no idea how large LPL was or how much they offered until our first meeting. After that, the decision to partner with LPL, aligning with Momentum Wealth Partners, was an easy one,” Mukoda said. “From their streamlined solutions, integrated technology and back-office support, everything LPL offers is top-notch and my clients are really happy. One thing I'm especially excited about is the content provided by LPL's Research Team . Every piece is insightful and interesting, and I really enjoy sharing relevant articles with my clients. It's just one more way LPL is helping us take our client experience to the next level.”

Asif Hussain, Momentum Wealth Partners Managing Partner and Co-founder, stated, “At Momentum, we support advisors with a success-oriented mentality, fostering an atmosphere where they are eager to enhance their practices and dedicated to providing service excellency to their clients. The Sussex team embodies this philosophy. Brad, David, Chris and Natalie, we are proud to welcome you to Momentum and LPL.”

Scott Posner, LPL Executive Vice President, Business Development, stated, “We extend a warm welcome to Chris, Brad, David and Natalie and are honored they turned to LPL and Momentum Wealth Partners on their journey to independence. At LPL, we are committed to helping advisors visualize and build their perfect practice by offering streamlined and integrated business solutions and personalized support to help them create an elevated experience for their clients. We look forward to supporting Sussex Wealth Partners for years to come.”

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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 mid-2023.*

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