LPL Financial

LPL Financial Welcomes Financial Advisor Tara Blair

May 15, 2024

SAN DIEGO, May 15, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Tara Blair, CFP®, CPA, has joined LPL Financial's broker-dealer, RIA and custodial platforms. She reported serving approximately $215 million in advisory, brokerage and retirement plan assets* and joins LPL from Lincoln Financial.

Based in Fort Worth, Texas, Blair has more than 25 years of experience in financial services following an initial career in public accounting. She built her wealth management practice from the ground up by building meaningful relationships and creating positive experiences for her clients. At Sage Private Wealth Services, Blair provides sophisticated estate, succession, investment and philanthropic strategies for affluent individuals, business owners and executives.

"We offer a total solution by accessing advanced professionals for a cross-disciplinary approach to wealth management," Blair said. "This enables my team to bring together various components of each client's financial lives to seamlessly design, implement and proactively manage comprehensive financial plans on an ongoing basis."

In the wake of industry consolidation, Blair decided to look for a new partner for the next chapter of her business. She turned to LPL after an in-depth due diligence process.

"LPL is a strong partner and Fortune 500 company that provides streamlined processes and innovative solutions for my business and clients," Blair said. "I'm excited to leverage LPL's integrated technology and have one centralized platform. Our clients will also appreciate seeing all their account information in one place. We exist for our clients, and that's ultimately what this move is about."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Tara and her team to the LPL community. We are honored that she recognized LPL's strength in the marketplace and commitment to providing end-to-end capabilities to help advisors differentiate themselves and provide great services. We look forward to a long-lasting relationship with Sage Private Wealth Services."

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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 nearly 23,000 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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