LPL Financial

LPL Financial Welcomes Cousino Wealth Advisors

Jun 5, 2024

SAN DIEGO, June 05, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq: LPLA) announced today that financial advisors Todd Cousino, Nicholas Hawk and Charles Moyer have joined LPL's employee advisor channel, Linsco by LPL Financial, to launch Cousino Wealth Advisors. The advisors reported serving approximately $265 million in advisory, brokerage and retirement plan assets* and join LPL from Ameriprise.

Based in Brownstown, Mich., Cousino and Hawk have worked as a team since 2015, with Moyer joining in 2020. They built their practice based on a collaborative approach that draws on each advisor's professional skills and experience. Together, they offer comprehensive financial planning and wealth management using a bucket strategy to grow and preserve wealth for their clients. The advisors are joined by Senior Client Services Associate Terri Rowe.

“We take great pride in the strong relationships we've built with our clients, and we are committed to providing them with the highest levels of service and advice,” Cousino said, noting they primarily serve clients in the engineering and automotive fields.

Looking to elevate their client experience and enhance office efficiencies, the team turned to LPL for the next chapter of their business.

“Our goal is to always be client-first, and we want to continuously increase and evolve their experience,” Cousino said. “We are excited to join LPL and leverage the firm's advanced technology to create greater practice efficiencies. LPL's integrated capabilities provide us with more choice in software and solutions to automate our workflow, which frees up our time to focus on what matters most: our clients.”

Not wanting to start from scratch, the team was drawn to the Linsco model that serves advisors seeking the core tenets of independence, including owning their client relationships and having the flexibility to run their practice on their own terms. With Linsco, advisors have access to LPL's integrated wealth management platform and robust business resources, along with the additional benefits of having support from an experienced branch management team and other dedicated consultants.

Scott Posner, LPL Executive Vice President, Business Development, said, “We welcome Todd, Chuck and Nick to the Linsco community. In today's environment, advisors often benefit from an additional layer of support for day-to-day operations so they can focus on what matters most: taking care of their clients. We look forward to supporting the business growth and success of Cousino Wealth Advisors as they leverage our robust technology platform and practice management programs to deliver differentiated client experiences.”

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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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