LPL Financial

Advisor Duo Joins LPL Financial to Launch 1818 Wealth Management

Jun 13, 2024

SAN DIEGO, June 13, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Stephen Shevlin and Jonathan Joelner, MBA, have joined LPL Financial's broker-dealer, RIA and custodial platforms to launch a new independent practice, 1818 Wealth Management. The team reported having served approximately $300 million in advisory, brokerage and retirement plan assets* and joins LPL from Stifel, Nicolaus and Co.

Based in Swansea, Ill. — just 20 minutes from the Gateway Arch in St. Louis — Shevlin and Joelner have worked together for nearly 10 years and have a combined 50 years of industry experience between them. The advisors take a people-first approach to serving a wide range of clients in approximately 30 states. Their new brand speaks to both advisors' pride in their home state, as Illinois officially joined the Union as the 21st state in 1818.

Shevlin and Joelner believe their approach to financial planning sets them apart from their peers. Focused on open communication and client education, the advisors involve their clients in each step of the planning process, even if that means having difficult conversations, Shevlin said. "In this industry, it's the people who make a difference in client engagement and outcomes," he said. "We treat our clients exactly how we would want to be treated, no matter their age, career or account size."

Looking to chart a new course for their practice and satisfy their long-held goal of owning a thriving business, Shevlin and Joelner turned to LPL in their move to independence.

"We can choose our own path and make decisions that are in the best interest of our clients," said Joelner. "The harder we work, the more it will benefit them and our business. And through LPL, we have the resources we need to do what we've always wanted to do."

The advisors said they look forward to leveraging LPL Marketing Resources to help build and amplify their brand while cultivating new marketing strategies that can take their new practice to the next level. Additionally, Joelner anticipates using LPL's retirement tools to make it easier to provide the investment guidance that helps clients hit their life goals.

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Stephen and Jonathan to LPL Financial. Our platform is designed to support the unique needs of independent advisor teams like theirs, providing robust resources and integrated technology that empower advisors to create personalized strategies and drive successful client outcomes. We look forward to supporting the 1818 Wealth Management team in their efforts to grow their practice, engage a broader clientele and deepen their already strong and productive client relationships."

Related

Advisors, find your perfect fit at LPL.

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.*

Connect with Us!

https://twitter.com/lpl

https://www.linkedin.com/company/lpl-financial

https://www.facebook.com/LPLFinancialLLC

https://www.youtube.com/user/lplfinancialllc

Media Contact:
Media.relations@LPLFinancial.com
(706) 254-4100

Tracking #588628