Father, Daughter Advisors Join Linsco by LPL Financial

Jul 1, 2024

SAN DIEGO, July 01, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that father and daughter financial advisors James (Jim) Zack and Amanda Zack have joined LPL's employee advisor channel, Linsco by LPL Financial, to launch The Zack Wealth Group. They reported serving approximately $290 million in advisory, brokerage and retirement plan assets* and join LPL from Morgan Stanley.

Based in Washington, D.C., Jim Zack is a seasoned advisor who has always been intrigued by the stock market. He recalled reading the stock pages in the newspaper in his youth and said his fascination with numbers, coupled with his love of serving others, led to his career as a financial advisor. Amanda Zack witnessed first-hand as her father started his business, went on calls and grew his client base, building lasting relationships along the way. She followed his footsteps by joining his practice eight years ago.

"We are a family team committed to helping other families, and it all starts with thorough planning and a deep understanding of our clients' goals and aspirations," Jim Zack said. "We take a service-oriented, client-centered approach to helping people preserve and manage their wealth, build their legacy and pass their wealth to future generations."

Looking for more flexibility and the ability to operate as true partners, the father-daughter team chose to move to Linsco by LPL. Linsco serves financial advisors who value the core tenets of independence, including owning their client relationships and having flexibility to run their practice, their way. With Linsco, employee 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, dedicated marketing consultant, technology consultant and service team.

"We did our due diligence and really liked the direction LPL is heading. We found it's much easier for us to be a team at LPL, and we appreciate that we have the freedom to run our practice the way we want," Jim Zack said. "Our team is very family-focused, so it's important that we build a business where we can truly put clients' best interests first and maintain their portfolios without corporate influence, just like if they were our own family."

LPL Executive Vice President Scott Posner, Business Development, said, "We welcome Jim and Amanda to the Linsco community and congratulate them on the launch of The Zack Wealth Group. With LPL's unprecedented flexibility and support, more advisors are recognizing the importance of freedom as they seek ways to differentiate themselves and enhance the client experience. Linsco grants advisors true client ownership and the freedom to manage and grow their relationships — and businesses — as they see fit. We look forward to a long-lasting and successful relationship with The Zack Wealth Management."

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.

Securities and Advisory services offered through LPL Financial LLC ("LPL Financial"), a registered investment advisor. Member FINRA/SIPC. LPL Financial and its affiliated companies provide financial services only from the United States.

Throughout this communication, the terms "financial advisors" and "advisors" are used to refer to registered representatives and/or investment advisor representatives affiliated with LPL Financial.

We routinely disclose information that may be important to shareholders in the "Investor Relations" or "Press Releases" section of our website.

**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
(704) 996-1840

Tracking #594848