LPL Financial

LPL Financial Welcomes Wealthstead Financial Advisors

Aug 15, 2024

SAN DIEGO, Aug. 15, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Jason Walker, Vladimir Nikitenko, CFP®, H. Scott Braswell, Rosty Tkachenko and John Hydrick, CFP®, have joined LPL Financial's broker-dealer, RIA and custodial platforms, aligned with existing firm Integrated Financial Group (IFG). They reported serving approximately $615 million in advisory, brokerage and retirement plan assets* and join LPL from Lincoln, now part of Osaic.

The Atlanta-based advisors are longtime colleagues who branched off to create a new practice, Wealthstead Financial Advisors. Led by Managing Partner Jason Walker, an Army veteran and graduate of the U.S. Military Academy at West Point, the Wealthstead team offers comprehensive financial planning services and investment advice, with a focus on retirement income planning and portfolio management. Their business primarily grew out of the nonprofit market and has a strong track record of helping clients on their path to financial success. Now, their diverse client base includes mass affluent families, executives and business owners.

After learning their former firm would be acquired, the Wealthstead team decided to survey the marketplace to find the ideal partner for the future of their business.

"After a thorough due diligence process, we felt the move to LPL was a natural fit for our team," said Walker. "We were looking for a partner that would allow us to collaborate more effectively and use each other's different backgrounds and specialties to better serve our clients. We believe LPL's integrated technology and strategic business resources give us more choices and robust tools to deliver exceptional experiences to our esteemed clients. We feel strongly that LPL will provide the independence and support we need to continue to grow our business the way we see fit."

The Wealthstead team also appreciates the localized support, resources and culture found at IFG. They look forward to building connectivity with other like-minded advisors and having access to IFG study groups to help them grow.

"Integrated Financial Group is thrilled to partner with Wealthstead as they embark upon this new journey with LPL and IFG," said Land Bridgers, CEO of Integrated Financial Group. "It has been an absolute pleasure to help Jason Walker and his team develop the Wealthstead brand as it truly reflects the values of their team and who they represent. IFG's comprehensive mutual selection process attracts amazing financial professionals like the Wealthstead team, and we are excited to provide services and support to them as they positively influence and serve their clients and community. We are excited to welcome Wealthstead to the IFG family and into our 'Brain Trust' of independent financial planners."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome the Wealthstead team to LPL and congratulate IFG on growing its community of advisors. At LPL, we are steadfast in our commitment to deliver a sophisticated wealth management platform and robust business tools designed to help advisors differentiate their practices and be successful serving the needs of their clients. We are a partner for the long haul and look forward to supporting Wealthstead Financial Advisors as they continue to grow, evolve and build their ideal practice."

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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 more than 23,000 financial advisors, including advisors at approximately 1,000 institutions and at approximately 580 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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