4Point Wealth Management Joins LPL Strategic Wealth Services

Aug 19, 2024

SAN DIEGO, Aug. 19, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Christina McConnell, CRC®, ADPA™, Laura Long, CRPC™, AWMA™, MBA, and Jay Tillman, CPWA®, CIMA®, CFP®, RICP®, CLU® have joined LPL Financial's supported independence model, LPL Strategic Wealth Services (SW). The team reported having served approximately $375 million in advisory, brokerage and retirement plan assets* and joins LPL from Wells Fargo Financial Advisors Network (FiNet).

Based in Davidson, N.C., just north of Charlotte, 4Point Wealth Management was founded in 2006 with a mission to champion each client's unique wealth journey and pursuit of financial independence. The highly accredited team has more than 50 years of industry experience, collectively, and they specialize in comprehensive retirement planning, asset allocation analysis, executive compensation and goals-based financial planning. They are supported by longtime Client Services Manager Randi Derene.

"We are committed to being there for each client's significant life moments," McConnell said, noting the name 4Point represents the four cornerstones of wealth management: building, managing, protecting and transitioning wealth. "We've grown our business organically over the years by providing a high level of service and developing meaningful relationships that go beyond investment management."

Over the years, the 4Point team has adapted to rising client expectations and industry changes, including going independent in 2021. Seeking more autonomy and the freedom to expand their business on their terms, they turned to LPL Strategic Wealth Services.

"Remaining true to our core principles, we decided it was time to evolve as a team and create a more ideal environment where we have true independence, supported by a partner who shares our values and client-first mentality," Long said. "Partnering with LPL allows us to be more transparent as we deepen our relationships with clients. We have access to best-in-class technology and strategic business resources, and we can now offer more personalized investment options and enhanced service experiences."

The team chose to affiliate via LPL's comprehensive supported independence solution, LPL Strategic Wealth Services, which combines the freedom and flexibility of entrepreneurship with hands-on business services and support to help practices thrive, both operationally and strategically. In addition to having access to LPL's innovative wealth management platform and sophisticated resources, SW advisors benefit from a truly integrated service that includes simplified pricing, technology and dedicated support to launch their practice. After the transition is complete, SW teams receive ongoing operations support managed by their team of experienced professionals including a business strategist, marketing partner, CFO and administrative assistant. Advisors have one point of contact, a dedicated team and priority access to advocacy and project management for complex business issues, ultimately allowing them to stay focused on the enduring needs of their clients and the culture and evolution of their practice.

"We really appreciate the invaluable support from LPL, including guidance on business development, marketing strategies and operational efficiency," Tillman said. "We are excited about having the autonomy to shape our practice the way we want and build a culture that reflects our true values and commitment to our clients. This new chapter allows us to spend more time serving our clients, offering an array of new products, services, support and tools for even more personalized financial strategies."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Christina, Laura, Jay and Randi to the LPL Strategic Wealth Services community. It's an honor to be their chosen partner as they build out the next phase of their ideal practice — one centered around putting their clients' best interests first. We are committed to delivering sophisticated resources and an open-architecture platform that allow advisors to use the tools that work best for their business. On top of that, the LPL Strategic Wealth Services team will be there each step of the way to provide an additional layer of comprehensive, modern services and support. We look forward to a long-lasting and successful relationship with 4Point Wealth Management."

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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.

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.

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**Value approximated based on asset and holding details provided to LPL from end of year, 2023.*

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