# LPL Financial Welcomes The Noble Group

Oct 3, 2024

SAN DIEGO, Oct. 03, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC, announced today that the advisors at The Noble Group have joined LPL Financial's broker-dealer, RIA and custodial platforms. They reported having served approximately $2.1 billion in advisory, brokerage and retirement plan assets* and join LPL from Raymond James.

Founded in 1996 by Tom Noble, AIF®, The Noble Group is a holistic wealth management firm that offers a range of financial services including corporate retirement plan consulting, financial planning, investment advice and portfolio management. With a team-oriented business model, the firm serves many high-net-worth families, retirees and business owners.

Based in Sugar Land, Texas, and with a registered office in Dallas, the team is comprised of nine advisors and 13 support staff members. Noble plans to step away from day-to-day operations, leaving leadership responsibilities to the next generation of advisors. Joey Rose, AIF®, who joined the firm in 2011, now serves as president and CEO.

"Whether partnering with clients to develop an effective, efficient and comprehensive financial plan for their families or managing corporate retirement plans, our team is committed to being there to guide clients through the journey — from education to realization," Rose said.

The Noble Group's transition to LPL underscores the company's dedication to delivering exceptional client service and providing advisors with the tools and resources for success. With LPL's robust digital capabilities, integrated platform and comprehensive support services, The Noble Group is strategically positioned for continued growth and prosperity.

"We believe LPL offers us the next level of independence, allowing us to select the financial planning software and resources that are most suitable for our clients," Rose said. "Today's clients want and need financial planning, and that's where advisors can add more value to relationships. We appreciate that LPL provides a blank canvas and the autonomy to create the service model of our choice."

The move to LPL also sets the team up for increased recruiting opportunities to grow the next generation of advisors, providing them with the support and resources needed to succeed in this ever-changing industry. "The culture we've created at The Noble Group is phenomenal. It's truly a place where you can come enjoy your career and grow within the organization, whether you're a new advisor or someone looking to retire," Rose said.

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome The Noble Group to LPL and look forward to supporting their continued growth and success. LPL is committed to providing advisors with ultimate choice and unprecedented flexibility in how they run their business. We will meet advisors where they are in the evolution of their practices and are committed to investing in innovative capabilities and strategic resources to help them thrive and win their market."

**Related**

Advisors, learn how LPL Financial can help take your business to the next level.

**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 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. The Noble Group and LPL Financial are separate entities.

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.*

**Media Contact:**
Media.relations@LPLFinancial.com
(704) 996-1840

Tracking #633623