LPL Financial Welcomes Financial Advisor Ashton Medina

Oct 14, 2024

SAN DIEGO, Oct. 14, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC, announced today that financial advisor Ashton Medina, CFA®, CFP®, has joined LPL Financial's broker-dealer and corporate RIA platforms, aligning with existing firm GradePoint Financial Group. He reported having served approximately $155 million in advisory, brokerage and retirement plan assets* and joins LPL from Synovus Securities.

Based in Miami, Fla., Medina is in his fifth year as an advisor following an initial career as a portfolio manager at a private bank. He's committed to delivering a broad spectrum of wealth management and financial planning services, with a focus on education to help his clients better understand the complexities of their financial lives.

"I am very passionate about the world of investments," said Medina, who immigrated from Colombia after graduating high school at age 16. "Transitioning from a portfolio manager to a financial advisor has allowed me to provide clients with a more holistic approach to their needs, so that I can address every facet of their finances and offer a higher level of value."

Looking for independence and the autonomy to run his business on his own terms, Medina turned to LPL and GradePoint.

"I'm excited to be part of LPL and GradePoint Financial Group," said Medina. "I really appreciate LPL's comprehensive digital platform with single sign-on where I can access everything in one place. This will allow me to expand my service offering and create more positive experiences for clients. I am also impressed with GradePoint's localized support and dedicated resources."

Jeff Hughes, President of GradePoint Financial Group, said, "We're thrilled to welcome our newest team member, Ashton Medina, to Gradepoint Financial. Ashton excels at transforming intricate challenges into customized solutions, especially in unique situations. With a keen focus on multi-generational wealth and estate planning, his personalized approach and attention to detail make him a great addition to our team. Welcome Ashton!"

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Ashton to LPL and congratulate him on making the move to independence. At LPL, we're committed to delivering differentiated support services and robust resources, along with the freedom, choice and ability advisors need to build a business of value on their own terms. We look forward to supporting the entire GradePoint Financial Group for years to come."

Related

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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 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. GradePoint Financial 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 #641811