



LPL Financial Welcomes GWC Financial Advisors to Linsco Channel

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SAN DIEGO, Nov. 05, 2024 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) (Nasdaq: LPLA), announced today that financial advisor Michael Bernier, CFP®, AIF®, has joined LPL's employee advisor channel, [Linsco by LPL Financial](#), to launch GWC Financial Advisors. He reported serving approximately \$165 million in advisory, brokerage and retirement plan assets* and joins LPL from Canter Wealth. He will operate from the Linsco office in San Diego.

With more than 20 years of experience in wealth management, Bernier helps clients work toward their goals using meticulous financial planning. His deep understanding of personal finance enables him to develop strategic approaches in the areas of tax strategy, investment management and retirement and estate planning.

"There are many things to worry about in life, but I get joy in taking at least one thing off my clients' plates," said Bernier, who specializes in creating tax-efficient income streams for retirees and pre-retirees. "I build long-lasting, meaningful relationships with my clients and their families, focusing on planning first to determine their goals and aspirations. It's my job to help make sure they are on track financially so they can invest accordingly."

Looking for more freedom and greater autonomy, Bernier turned to Linsco by LPL to launch GWC Financial Advisors. (GWC are his children's initials.) He said the new practice embodies a spirit of careful decision-making, expertise and personalized service.

"My clients' financial well-being is always at the forefront of my mind. As an advisor with a fiduciary focus, my job is to continuously look for ways to act in their best interest and improve their overall experience," Bernier said. "The decision to move to LPL came after a great deal of due diligence. I believe LPL's comprehensive services and tools, along with its model of transparency and dedication to independence, allow me to give my clients guidance on what is most appropriate for them."

The Linsco employee advisor model serves financial advisors seeking the core tenets of independence, including managing their client relationships and having the flexibility to run their practice on their own terms. With Linsco, 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 and other dedicated consultants.

"I'm thrilled to join Linsco and have the opportunity to work with such a supportive and collaborative team," said Bernier. "LPL's commitment to providing advisors with the resources and technology they need to succeed is impressive, and I'm excited to leverage these resources to better serve my clients. I look forward to running my own practice while being fully supported by a firm that matches my high standards."

Outside of work, Bernier is active in his community. He teaches retirement adult education courses at colleges across San Diego. He serves as a board member of Poway American Little League and is an active member in the Aztec Club supporting San Diego State Athletics. He was previously a den leader and now serves as Committee Chair for Cub Scout Pack 109.

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Mike to the Linsco community. At LPL, we fundamentally believe that advisors should serve their clients the way they think is best, with choice, flexibility and control in how they build their business. We support their vision by providing innovative capabilities and business solutions designed to help advisors thrive. We look forward to supporting the growth and evolution of GWC Financial Advisors for years to come."

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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.

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

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