LPL Financial Welcomes S&G Wealth Partners

Nov 7, 2024

SAN DIEGO, Nov. 07, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC, announced today that the financial advisors at S&G Wealth Partners have joined LPL Financial's broker-dealer, RIA and custodial platforms. They reported serving approximately $165 million in advisory, brokerage and retirement plan assets,* and they join LPL from Osaic.

Based in Tempe, Ariz., the firm is led by financial advisors Scott Garber and Marcus Seiter, with support from Nicole Kennedy, who will become a partner in January. The advisors each have more than 20 years of experience in the financial services industry. Garber, who started his career as an elementary school teacher, focuses on financial education, wealth management and helping clients save for retirement. Seiter has a law degree and manages estate planning for the business, in addition to asset management.

"As a firm, we're deeply committed to providing clients with personalized advice and helping them make informed financial decisions," Garber said. "Our mission is to help clients fully utilize the rewards of their hard work so they can live their best life and provide for their loved ones. Our offering centers around building wealth, maintaining wealth and easily dispensing wealth to future generations."

Looking for enhanced technology and more resources, the team embarked on a due diligence process that led them to LPL Financial.

"We chose to join LPL because of its reputation for providing very robust technology, comprehensive resources and personalized support," Garber said. "We believe that this move will allow us to take our business to the next level and provide clients with an even higher level of service. Already, it's been a breath of fresh air working with LPL, and the professional support from the transition team made the move easier than we expected."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Scott and Marcus to the LPL community. LPL is committed to supporting each advisor's ability to provide clients with differentiated experiences through delivering strategic resources and innovative capabilities to help them build a business with value. We look forward to a long-lasting relationship with S&G Wealth Partners for years to come."

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.

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.*

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