LPL Financial

LPL Financial Welcomes Jackson/Roskelley Wealth Advisors

Feb 6, 2025

SAN DIEGO, Feb. 06, 2025 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Jared Roskelley, CFP®, and Kyle Robertson, CFP®, of Jackson/Roskelley Wealth Advisors have joined LPL Financial's broker-dealer, Registered Investment Advisor (RIA) and custodial platforms. They reported serving approximately $345 million in advisory, brokerage and retirement plan assets* and join LPL from Ameriprise.

Based in Scottsdale, Ariz., Jackson/Roskelley Wealth Advisors was founded on the principles of integrity, insight and independence. Founder Bob Jackson started the firm in 1994, bringing Roskelley on board as a shareholder in 2006 after the two struck up a friendship during coursework for CFP® certification. Roskelley later became president and CEO, allowing Jackson to successfully transition into retirement. Robertson joined the practice in 2015 and now serves as managing director and represents the third generation of ownership for Jackson/Roskelley Wealth Advisors.

"We offer investment strategies, financial planning and goals-based advice to help clients feel more confident about their financial future," said Roskelley, who learned early on about the complexities of finance from his father, a tax and insurance specialist. "We focus on the comprehensive nature of financial planning to integrate investments, risk tolerance, estate planning and tax strategies into a singular, personalized plan for each client."

Looking to get back to their true independent roots, the advisors turned to LPL for the next chapter of their business.

"From Day One, we've always valued independence and entrepreneurship," Roskelley said. "By moving to LPL we have more control of our destiny and the power to do what's in our clients' best interests. We appreciate that LPL does not offer proprietary investment products, and we also believe clients will benefit from LPL's industry-leading, integrated technology that allows them to access all their account information with a single login."

Staying involved in the community is a priority for both advisors. Roskelley is in the Boy Scouts of America Scoutmaster Hall of Fame (Mesa District) and previously served as director of programming for the Financial Planning Association of Greater Phoenix. Robertson is also active in his community, serving as president of his school's parent-teacher organization and athletic committee while also coaching multiple youth sports leagues.

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Jared and Kyle to the LPL community. LPL is committed to delivering innovative capabilities and strategic resources that make it easier for advisors to manage their practices, accelerate their business and build long-term value with their clients. We look forward to supporting Jackson/Roskelley Wealth Advisors for years to come."

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About LPL Financial

LPL Financial Holdings Inc. (Nasdaq: LPLA) is among the fastest growing wealth management firms in the U.S. As a leader in the financial advisor-mediated marketplace, LPL supports more than 29,000 financial advisors and the wealth management practices of 1,200 financial institutions, servicing and custodying approximately $1.7 trillion in brokerage and advisory assets on behalf of 6 million Americans. The firm provides a wide range of advisor affiliation models, investment solutions, fintech tools and practice management services, ensuring that advisors and institutions have the flexibility to choose the business model, services, and technology resources they need to run thriving businesses. For further information about LPL, please visit www.lpl.com.

**Value approximated as reported to LPL*

Media Contact:

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

Tracking #688390