



LPL Financial Welcomes Lex Wealth Management

Feb 11, 2025

SAN DIEGO, Feb. 11, 2025 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisors Carmen M. Lex Jr., CFP®, RICP®, and Chris Lex, CRPC®, have joined LPL Financial's broker-dealer, Registered Investment Advisor (RIA) and custodial platforms. The brothers reported serving approximately \$630 million in advisory, brokerage and retirement plan assets* and join LPL from Corebridge Financial, formerly Valic, a subsidiary of AIG.

Based in Marlton, N.J., Carmen and Chris have built a reputation for delivering tailored investment strategies and quality service since they teamed up in 2014. They specialize in financial planning, and both have significant experience in pension and social security analysis, including the intricacies of the Public School Employees' Retirement System. The Lex brothers credit their grandmother and parents as inspiration for their financial journey.

"We had a lot of people who guided us to where we are today, especially our grandmother who taught us the importance of saving from a young age," said Chris Lex. "That fueled our drive to help others with important financial decisions. We are committed to educating and empowering individuals and families to take control of their financial futures."

Why they made the move to LPL Financial

After more than 15 years in the industry, Carmen and Chris realized their shared vision for delivering personalized, independent financial guidance. They decided to reshape their approach, prioritize independence and build a firm focused on providing tailored strategies and exceptional client service. This spurred their move to LPL and the creation of Lex Wealth Management.

"As we work with more clients in the distribution phases, we realized there are more personalized options available to us as independent advisors," said Carmen. "By joining LPL Financial, we'll benefit from [innovative technology](#), strategic business resources, a comprehensive product selection and the support of an industry-leading wealth management firm. This move gives us everything we need to be better advisors and do right by our clients."

Scott Posner, LPL Executive Vice President, Business Development, said, "We extend a warm welcome to Carmen and Chris and congratulate them on the move to independence. With more freedom and flexibility, financial advisors who choose LPL are able to work more effectively, run thriving practices and create value for the evolving needs of their clients. We look forward to supporting Lex Wealth Management for years to come."

Related

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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 nearly 29,000 financial advisors and the wealth management practices of approximately 1,200 financial institutions, servicing and custodialing approximately \$1.7 trillion in brokerage and advisory assets on behalf of approximately 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.

Securities and advisory services offered through LPL Financial (LPL), a registered investment advisor and broker dealer, member FINRA/SIPC. Lex Wealth Management and LPL 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, 2024.*

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