



## LPL Financial Welcomes Oxford Oaks Capital to Linsco Channel

Mar 27, 2025

SAN DIEGO, March 27, 2025 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisor Austin Greer, CRPS®, has joined LPL's employee advisor channel, [Linsco by LPL Financial](#), to launch [Oxford Oaks Capital of LPL Financial](#). He reported serving approximately \$600 million in advisory, brokerage and retirement plan assets\* and joins LPL from UBS.

Based in the Linsco office in Franklin, Tenn., Greer originally set out to become a high school English teacher before following his father's footsteps into financial services. He appreciates the educational component of his role as a financial advisor to help clients understand their investments. Now with more than 17 years of industry experience, Greer focuses on retirement income planning, as well as tax and estate planning for high-net-worth clients, including business owners and doctors.

Wealth Advisor John Dunahoo has been with the team for more than 11 years and Senior LPL Registered Service Associate Stephanie DePriest joined the firm in 2020, both bringing a wealth of knowledge and a client-first approach to the practice.

"Our practice is very familial and holistic, with a friendly feel in our communications and approach," Greer said. "We ask a lot of questions before putting together personalized, strategic financial plans and portfolios designed to help take the stress off our clients. We often tell clients, 'We love investments, so you don't have to.'"

### **Why they made the move to Linsco by LPL**

Looking for more autonomy, enhanced technology and office efficiencies, the team turned to LPL for the next chapter of its business. They were drawn to the Linsco model, which serves financial advisors seeking the core tenets of independence, including owning their client relationships and having flexibility to run their practice, their way. 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, dedicated marketing consultant and other resources that allow advisors to focus on their clients.

"LPL's robust investment in resources and technology was a compelling factor in our decision to make this transition," Greer said. "We anticipate increased office efficiencies, streamlined operations and enhanced service capabilities. We also appreciate the pro-advisor culture at LPL and the flexibility to build a practice on our terms. Ultimately, aligning with LPL enables us to focus on our core strength—delivering exceptional client service."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Austin, John and Stephanie to the Linsco community. With LPL's support, more advisors are recognizing the importance of freedom and flexibility as they seek ways to differentiate themselves and enhance the client experience. We look forward to supporting Oxford Oaks Capital 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 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](http://www.lpl.com).

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*\*Value approximated based on asset and holding details provided to LPL from end of year, 2024.*

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