



EverMark Investment Partners Launches with Support from LPL Strategic Wealth

Jun 17, 2025

The Advisor Trio Becomes the 50th Team to Join LPL's Strategic Wealth Services Affiliation Model

SAN DIEGO, June 17, 2025 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisors Matthew Sweeney, CFP®, John Folsom and Tanner Carter, CFP®, have launched a new independent practice, [EverMark Investment Partners](#) ("EverMark"), through affiliation with LPL Financial's supported independence model, [LPL Strategic Wealth](#). They reported serving approximately \$425 million in advisory, brokerage and retirement plan assets* and join LPL from RBC.

Based in San Diego, Folsom and Sweeney have collaborated since 1996 and bring a combined seven decades of financial industry experience to the practice. Carter, who entered the financial industry in 2019, completes the team. Together with Senior Investment Associates Nomah Cronk and Kristin Garnica, the team takes a collaborative approach to helping their clients work towards more secure financial futures.

"We are fortunate to have longevity and loyalty with our clients — in fact, nearly half of our clients are multigenerational," Sweeney said. "When clients work with us, we offer them the experience of a long-tenured team, the discipline of active portfolio management and the perspective that comes from working with multiple generations over time. We value direct communication, mutual respect and clear thinking. And while our work is serious, we never lose sight of the people we serve or the trust they place in us."

Why the EverMark team made the move to LPL Strategic Wealth

EverMark chose to affiliate via LPL's comprehensive supported independence solution, LPL Strategic Wealth Services (SW), which combines the freedom and flexibility of entrepreneurship with hands-on business services and support to help practices thrive, both operationally and strategically.

In addition to access to LPL's innovative wealth management platform and sophisticated resources, SW advisors benefit from a truly integrated service that includes simplified pricing, technology and dedicated support to launch their practice. Then, after the transition is complete, SW teams receive ongoing operations support managed by their team of experienced professionals including a business strategist, marketing partner, CFO and administrative assistant. Advisors have one point of contact, a dedicated team and priority access to advocacy and project management for complex business issues, ultimately allowing them to stay focused on the enduring needs of their clients and the culture and evolution of their practice.

With the move, EverMark Investment Partners becomes the 50th team to join Strategic Wealth, LPL's breakaway solution for growth-oriented advisors who are looking for the best of both worlds — full independence and full support. Established in 2020, Strategic Wealth was designed to support the unique needs of established advisors in wirehouses and other firms seeking to launch independent practices.

"LPL's Strategic Wealth model is unlike anything else in the market today," Folsom said. "It takes the best aspects of being RIAs — owning our own business, our client relationships belonging to us, choice in technology and services, optimal succession solutions — and packages it with an outstanding process to help us set up our business for success from day one. It's an honor knowing that EverMark is the 50th team to join LPL's Strategic Wealth, and we are proud to join this community of like-minded advisors."

Carter added, "With LPL's [best-in-class technology](#) and strategic business resources, we will be able to provide more personalized investment options and enhanced service experiences. I am confident that moving to LPL and LPL Strategic Wealth was the right move for our business — and, more importantly, our clients.

Scott Posner, LPL Managing Director, Business Development, said, "We welcome the EverMark Investment Partners team and congratulate them on going independent with LPL Strategic Wealth and becoming the 50th team in the model. Just as Matt, John and Tanner take a personalized approach to helping their clients pursue their fiscal goals, LPL offers the strategic support and innovative resources advisors can use to deliver differentiated client experiences. We look forward to supporting this team 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 over 29,000 financial advisors and the wealth management practices of approximately 1,200 financial institutions, servicing and custodying approximately \$1.8 trillion in brokerage and advisory assets on behalf of approximately 7 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 LLC (“LPL Financial”), a registered investment advisor and broker-dealer, member FINRA/SIPC.

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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