LPL Financial Welcomes The Narmi Group Investment Management to Linsco Channel

Jul 10, 2025

SAN DIEGO, July 10, 2025 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Charlie Narmi and Theresa Rynaski, CFP®, have joined LPL's employee advisor channel, Linsco by LPL Financial, to launch The Narmi Group Investment Management. They reported serving approximately $870 million in advisory, brokerage and retirement plan assets* and join LPL from Robert W. Baird & Co.

Based in Omaha, Neb., Narmi, a second-generation financial advisor, and Rynaski have worked together for two decades and have built a reputation as a team that goes above and beyond for their clients — which includes a mix of young professionals, non-profit organizations and those nearing or in retirement.

"We pride ourselves on being a one-stop-shop for our clients," Rynaski said. "It's not unusual for us to go the Social Security office with them or help them research nursing homes. We are honored that our clients trust us with so many important life decisions, as well as with their financial futures, and it's a privilege to walk alongside them every step of the way."

Why The Narmi Group Investment Management made the move to Linsco by LPL
The transition to LPL Financial for the next chapter of their business was motivated by the team's aspiration for autonomy, flexibility and enhanced technology. 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.

"Partnering with LPL will allow us to have the backing of a large firm, but with the independence to serve our clients our way," Rynaski said. "LPL provides the ideal platform, size and scale, and their commitment to invest heavily in integrated and streamlined technology will allow us to best support our clients, grow our business and build more long-lasting relationships."

Scott Posner, LPL Managing Director, Business Development, said, "We welcome Charlie and Theresa to the Linsco community, and congratulate them on the launch of The Narmi Group Investment Management. At LPL, we are committed to offering differentiated experiences for advisors and their clients. We do that by offering unparalleled flexibility, strategic resources and innovative technology designed to help advisors deliver an elevated client experience while operating thriving practices. We look forward to supporting The Narmi Group Investment Management 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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Tracking #749827