LPL Financial Welcomes Women-Led Chloey Wealth

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SAN DIEGO, Aug. 21, 2025 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that advisors Jenna Vitosh and Natalia Paige have joined forces to launch Chloey Wealth with LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. They reported serving approximately $140 million in advisory, brokerage and retirement plan assets.* Vitosh joins LPL from Edward Jones and Paige from New York Life.

Based in Lincoln, Neb., the team has 20 years of experience. Vitosh is a second-generation financial advisor who has a passion for helping people. Paige started out in the medical field but discovered her passion for financial planning after becoming the head of her family's finances. The two met at a networking event five years ago, and their friendship flourished as they continued to meet over coffee and use each other as sound boards as they launched their financial planning careers. The all-female team takes a holistic approach to helping clients work towards their financial goals and their clients come from all walks of life but are primarily young families and pre-retirees.

"We focus on the psychological aspects of money and why people may hesitate to discuss financial matters," said Paige. "It starts with building trust and sharing this type of personal information with confidence. Our goal is to understand our clients' financial background and overcome past issues, enabling comfortable discussions about financial planning. We address all areas of financial planning, not just one specific area."

Why Chloey Wealth Advisors Chose LPL

Looking for more freedom, flexibility and a new partner to help them grow their practice, the team turned to LPL.

"We felt very called by the autonomy offered by LPL. When Natalia and I started thinking about combining forces, even though we came from different firms, the thought of LPL started making sense," said Vitosh. "We realized just how independent we really could be, how we could brand ourselves and be able to bring our distinct expertise to our clients while having the confidence and resources of a big name behind us."

Scott Posner, Managing Director, Business Development, said, "We welcome Jenna and Natalia to LPL. With more ways than ever to be an entrepreneur, financial advisors who choose LPL can work more effectively, run thriving practices and build and grow their practice according to their vision. We look forward to supporting the Chloey Wealth 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 1,100 financial institutions, servicing and custodying approximately $1.9 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.

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

Media Contact:
Media.relations@LPLFinancial.com

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