



## LPL Financial Welcomes Worley Monroe Advisors

Sep 18, 2025

SAN DIEGO, Sept. 18, 2025 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that advisors, Benjamin Worley, AAMS®, and Robert Monroe, CFP®, have come together to form [Worley Monroe Advisors](#) and join LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. They reported serving approximately \$400 million in advisory, brokerage and retirement plan assets\* and join LPL from Edward Jones.

Based in southeast Missouri in the town of Dexter, the team has 36 years of experience. Worley's interest in finance was sparked at a young age when he began investing in the stock market. He continued to invest throughout his teenage years before pursuing the career professionally. Monroe has always enjoyed working with people and served as a worship pastor for 16 years before joining the financial services sector. Worley and Monroe's clients consist of pre-retirees and retirees in Missouri and several other states.

"Our approach to clients begins with gaining a deep and personal understanding of their current situation and future goals," said Worley. "I like to think of us as the 'puzzle people.' We take the various pieces of information provided by our clients about their financial situation and goals. We then help them configure these pieces in a way that helps them envision their financial future and pursue their objectives."

### Why Worley Monroe Advisors Chose LPL

Looking for improved technology, autonomy and flexibility, Worley and Monroe embarked on an extensive due diligence process that led them to LPL.

"We chose LPL after conducting a thorough due diligence process with other firms. We were looking for a firm that would best fit our clients' investment needs and help to up-level our client service, while also providing the necessary support for us professionally as advisors to grow and serve effectively," said Monroe. "LPL gives us the flexibility to truly focus on our clients' needs. We can now offer quality products while maintaining our own brand and client relationships."

Scott Posner, Managing Director, Business Development, said, "LPL extends a warm welcome to the team and congratulates them on the launch of Worley Monroe Advisors. We are proud to support their vision by providing elevated services and integrated technology to help them remain competitive in the evolving wealth management landscape. We look forward to supporting Ben and Robert 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 over 29,000 financial advisors and the wealth management practices of approximately 1,100 financial institutions, servicing and custodialing 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. Figures provided as of June 30, 2025. For further information about LPL, please visit [www.lpl.com](http://www.lpl.com).

**Securities and advisory services offered through LPL Financial LLC ("LPL Financial"), a registered investment advisor and broker-dealer, member FINRA/SIPC.** Worley Monroe Advisors and LPL Financial 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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