LPL and Private Advisor Group Welcomes Robert Woodend to Memphis Planning and Wealth

Mar 3, 2026

SAN DIEGO, March 03, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Robert Woodend, CRPC®, has joined LPL Financial's broker-dealer and will be leveraging the Private Advisor Group (PAG) Registered Investment Advisor (RIA) platform and infrastructure as part of his transition to Memphis Planning and Wealth, an established LPL and PAG aligned practice. Woodend reports serving approximately $150 million in advisory, brokerage and retirement plan assets* and joins LPL from Ameriprise.

Based in Memphis, Tenn., Woodend is a second-generation financial advisor with 15 years of industry experience. He began his career by interning with his father throughout high school and college before roles in the bond business and ultimately transitioning into financial planning.

Woodend serves primarily pre-retirees and retirees, with a long-term goal of expanding to younger clients nearing major life milestones. His practice centers on ethical guidance, risk-adjusted financial planning and deep personal relationships — strengthened by his habit of maintaining detailed personal notes to support meaningful, tailored conversations with clients.

"What makes our practice different is the depth of the relationships we build with our clients," said Woodend. "I take the time to truly understand their goals and lives so I can guide them with honesty, ethical care and long-term perspective. Those connections are why I'm confident my clients will follow me — they trust the work we do and the personal attention we bring to every interaction."

Why Robert Woodend Chose LPL and PAG

Seeking greater autonomy, independence and access to more scalable operational infrastructure, the team — which also includes Sherri Grear, Michael Terry and Danny Woodend — turned to LPL.

"When I began evaluating my next step, I knew autonomy and true independence were non-negotiable for me," said Woodend. "LPL and PAG offered exactly what I was looking for — the ability to maintain my independence while gaining access to a deeper operational infrastructure and the resources I need to support the next stage of my growth. By joining Memphis Planning & Wealth and leveraging both platforms, I'm confident I can deliver more sophisticated services, strengthen the client experience, and continue building my practice the right way."

"We are excited to provide Robert with local practice support combined with a robust community of elite advisors via Private Advisor Group," said Joshua Black MBA, CFP®, president and private wealth advisor at Memphis Planning and Wealth. "Our culture of collaboration is aligned with Robert's desire to put his clients first and deliver the service, technology, and advice they deserve."

"It's been a privilege working with Robert throughout this journey, including time together at LPL's home office. His values and commitment to clients are a strong cultural fit, and his partnership with Joshua is an impressive one. Private Advisor Group and LPL look forward to supporting their continued success," said Karen Hayes, business development consultant at PAG.

Scott Posner, managing director of business development at LPL, said, "We're pleased to welcome Robert and his team to the LPL community. His strong client relationships and commitment to doing what's right align closely with LPL's values. With the combined support of LPL and PAG, Robert will have the flexibility and resources he needs to continue growing his practice and enhancing the service he provides to clients."

Related

Advisors, learn how LPL Financial can help take your business to the next level.

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 32,000 financial advisors and the wealth management practices of approximately 1,200 financial institutions, servicing and custodying approximately $2.4 trillion in brokerage and advisory assets on behalf of approximately 8 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 adviser

and broker-dealer. Member FINRA/SIPC. Memphis Planning and Wealth, Private Advisor Group and LPL Financial are separate entities.

**Value approximated based on asset and holding details provided to LPL from end of year, 2025.*

Media Contact:
Media.relations@LPLFinancial.com

Tracking # 1069279