

## Sixteen Financial Advisors with Level Four® Wealth Management Recognized by LPL Financial

**PLANO, TX – Feb. 15, 2016** – The following advisors today announced that they were named to LPL's Director's Club. This distinction is based on where the advisor's annual production ranks among the firm's approximately 14,000 registered nationwide advisors\*.

Sharon Baca of Plano, TX  
Bob Berry of Lexington, SC  
Chad Castrinos of Metairie, LA  
Joe Globensky of Plano, TX  
Joe Hall of Naperville, IL  
Billy Hemby of La Grange, NC  
Dennis Long of Houston, TX  
Mark Mitamura of Irvine, CA

Adam Prewett of Plano, TX  
Michael Romig of Plano, TX  
Jeff Schlicht of Minnetonka, MN  
Richard Sheridan of Irvine, CA  
Tom Tarvis of St. Charles, IL  
Brian Tillotson of Southlake, TX  
Alan Tipton of Shreveport, LA  
Steve Wheeler of Bowling Green, KY

"Director's Club advisors exemplify leadership in the financial industry and in their communities," said Andy Kalbaugh, managing director and divisional president, LPL Business Consulting and Relationship Management. "We congratulate these advisors on this distinct achievement, which represents not only an elite level of success, but a commitment to superior service and to helping clients prosper and pursue their financial goals."

These advisors are affiliated with LPL and provide access to independent financial planning services, investment advice and asset management services to clients.

### **About Level Four® Wealth Management**

Based in Plano, Texas, Level Four® Wealth Management is a comprehensive wealth management firm utilizing an ensemble practice methodology to provide its clients with the highest level of service. Level Four® Wealth Management also provides extensive business development and operational support to accounting firms and financial professionals seeking to create a holistic financial services offering. Its office of supervisory jurisdiction (OSJ) provides support services to over 120 financial professionals, and its coaching and training services drives its philosophy across its members' practices. Its SEC-registered investment advisor (RIA), Level Four® Advisory Services, LLC, is an independent, full-service investment management firm providing a broad array of financial services, including retirement planning, tax management, estate planning, risk management, education funding, investment management, employee and executive benefits. Level Four® Advisory Services has aligned with LPL Financial as its broker-dealer in order to maximize the value it can bring to clients, through LPL's extensive range of tools and services. More information is available at [www.levelfouradvisors.com](http://www.levelfouradvisors.com).

### **About LPL Financial**

LPL Financial, a wholly owned subsidiary of LPL Financial Holdings Inc. (NASDAQ:LPLA), is a leader in the retail financial advice market and currently serves \$462 billion in advisory and brokerage assets. LPL is one of the fastest growing RIA custodians and is the nation's largest independent broker/dealer (based on total revenues, Financial Planning magazine June 1996-2015). The company provides proprietary technology, comprehensive clearing and compliance services, practice management programs and training, and independent research to more than 14,000 independent financial advisors and over 700 banks and credit unions, enabling them to help their clients turn life's aspirations into financial realities. Advisors associated with LPL also service an estimated 40,000 retirement plans with an estimated \$115 billion in retirement plan assets, as of September 30, 2015. LPL also supports approximately 4,300 financial advisors licensed and affiliated with insurance companies with customized clearing, advisory platforms, and technology solutions. LPL Financial and its affiliates have 3,413 employees with primary offices in Boston, Charlotte, and San Diego. For more information, please visit [www.lpl.com](http://www.lpl.com).

*Securities offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through Level Four Advisory Services, LLC, a registered investment adviser. Level Four Advisory Services, LLC and Level Four Wealth Management are separate entities from LPL Financial.*

*\*Director's Club recognizes a production level greater than 80% of LPL Financial Advisors.*

