Lineage Wealth
Management, Inc.

Leadership | Freedom
Confidence

Who We Are

Our independent business model allows our financial planners & advisors to deliver the experience and resources of a large financial firm with the level of personal attention and service found in wealth management boutique firms.

What We Offer

COLLABORATIVE TEAM

Largest Independent Broker-Dealer service team
Self Clearing
Concierge receptionist
Specialized Staff support
RIA Compliance Support
OSJ Supervision

QUALITY BRAND

Downtown Norfolk with
Complimentary Onsite Parking
Building On-site Main Lobby Security
Outstanding Compliance record
Developed marketing materials
Client seminars & workshops

State-of-the-art Fintech Stack

State-of-the-art Dell Multimonitor workstations
State-of-the-art Poly video telephony system
State-of-the-art Poly audio & video Conference Room
State-of-the-art Sharp Advance Series Color Document Systems
Wealthbox CRM - Central Hub aggregation
Multiple Portfolio Reporting & Rebalancing software
Furnished high-end office
Personalized stationary
Multiple Retirement Planning software
Vertical Integrated Financial planning software

About Lineage Wealth

Lineage Wealth Management Incorporated mission is to offer you Freedom, Confidence and a Principled Relationship...

This type of relationship is built by creating a Consistently Comprehensive Pro Active High Touch process with you so you can invest your time on having fun and Enjoying Your Life... Experience Wealth Management the way it should be...

TRANSITION SUPPORT

Our Lineage and LPL Financial team will support you through each step to ensure a seamless and successful transition, so you can focus on what's most important: your clients.

BUILDING TOMORROW TOGETHER

Why LPL is right for you

Personalized Support
Our 1:4 ratio of employees to financial professionals ensures you have the service and support to help exceed client expectations.

No Proprietary Products
LPL has no proprietary investment products or investment banking operations. Financial professionals are empowered to make informed recommendations based on comprehensive research and unique client goals.

Industry-Leading Technology
Run all your daily operational tasks through a single, integrated central platform. Our technology is the #1 reason advisors join LPL.

Simplifying Your Transition
We do the legwork so you can focus on running your business while you transition. In some cases, the process can take as little as 2 months.

LineageWealth

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www.Lineagewealth.com

"True wealth can not be measured in dollars alone, it is in the values and legacy one leaves behind."