



**Lineage Wealth**  
Management, Inc.

## 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



### **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.

### **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

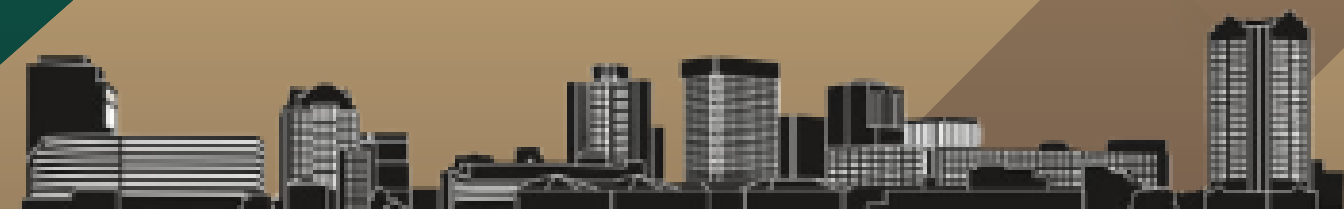
**Leadership | Freedom  
Confidence**

## 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...**

**BUILDING TOMORROW  
TOGETHER**





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## 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.



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 **www.Lineagewealth.com**

Securities And Financial Planning  
Offered Through LPL Financial.  
Member FINRA/SIPC

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

