LPL Financial

# 21 LPL Financial Advisors Named Forbes Top Women Advisors 2020

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CHARLOTTE, N.C., April 28, 2020 (GLOBE NEWSWIRE) -- **LPL Financial LLC**, a leading retail investment advisory firm and independent broker-dealer, today announced that 21 of its affiliated advisors have been included in this year's *Forbes* Top Women Wealth Advisors list.

LPL advisors recognized on the list include:

- Sandra Cho, Pointwealth Capital Management, Encino, Calif.
- Loreen Gilbert, WealthWise Financial Services, Irvine, Calif.
- Kristina Kuprina, Sequoia Wealth Advisors & Investment Management Inc., San Jos, Calif.
- Shari Miller, LPL Financial, La Jolla, Calif.
- Laila Pence, Pence Wealth Management, Newport Beach, Calif.
- Winnie Sun, Sun Group Wealth Partners, Irvine, Calif.
- Anh Tran, JanHobbs Financial Group, Orange, Calif.
- **Monika Windle, Financial Plan Design, La Mesa, Calif.**
- Lori Price, Price Financial Group, Wilton, Conn.
- Joan Valenti, LPL Financial, Farmington, Conn.
- Judy VanArsdale, Lakeview Wealth Management, Deer Park, Ill.
- Gina Bolvin Bernarduci, Bolvin Wealth, Boston, Mass.
- Deborah Goodman, Goodman Advisory Group, Needham Heights, Mass.
- Susan Kaplan, Kaplan Financial Services, Newton, Mass.
- Lisa Guzek Montagne, LGM Wealth Management, Bloomington, Minn.
- Deborah Danielson, Danielson Financial Group, Las Vegas, Nev.
- Julia Carlson, Financial Freedom Wealth Management Group, Newport, Ore.
- Kristy Motta, Consolidated Financial Management, Beaverton, Ore.
- Lisa Bodine, Penn Wealth Planning, New Hope, Penn.
- Sarah Carlson, Fulcrum Financial Group, Spokane, Wash.
- Lori Watt, IAG Wealth Partners, Waukesha, Wis.

"This is a prestigious list of very accomplished women advisors, and I congratulate each of these dedicated and talented advisors on behalf of the entire LPL family," said Andy

Kalbaugh, LPL managing director and divisional president, National Sales and Consulting. “These advisors demonstrate an unparalleled commitment to their clients, providing meaningful insights and hands-on service as they help them work toward their financial goals and dreams. We thank these advisors for demonstrating the value of LPL’s independent platform to help women reach their full potential in our industry. LPL is proud to provide the resources, technology and service to support these top advisors and we wish them continued success.”

The Top Women Wealth Advisors list includes 1,000 financial advisors, who, according to Forbes, were selected for the list based on insights from SHOOK Research, compiled from an algorithm of qualitative and quantitative data. Advisors are assessed on a variety of criteria, including in-person interviews, years of experience, compliance records and assets under management*.

See the full **2020 Top Women Wealth Advisors list**.

**About LPL Financial**
LPL Financial (**https://www.lpl.com**) is a leader in the retail financial advice market and the nation’s largest independent broker-dealer**. We serve independent financial advisors, professionals and financial institutions, providing them with the technology, research, clearing and compliance services, and practice management programs they need to create and grow thriving practices. LPL enables them to provide objective guidance to millions of American families seeking wealth management, retirement planning, financial planning and asset management solutions.
**Based on total revenues, *Financial Planning* magazine June 1996-2019

LPL Financial, Forbes, SHOOK Research and the advisor firms listed are separate entities.

This award does not evaluate the quality of services provided to clients and is not indicative of this advisor’s future performance. Neither LPL Financial nor the advisors pay a fee to Forbes in exchange for inclusion in the Top Women Wealth Advisors list.

*The Forbes ranking of America’s Top Women Wealth Advisors, developed by SHOOK Research, is based on an algorithm of qualitative and quantitative data, rating thousands of wealth advisors with a minimum of seven years of experience and weighing factors like revenue trends,  assets under management, compliance records, industry experience and best practices learned through telephone and in-person interviews. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receives a fee in exchange for rankings.