10.6.23

Contact:
Sarah Carlson, CFP®, CLU®, ChFC®
509-747-2075
Sarah.Carlson@lplfinancial.com

SARAH CARLSON NAMED A 2023 'ADVISOR TO WATCH' BY ADVISORHUB

Spokane, Washington — October 6, 2023 **–** Sarah Carlson has been named a **2023 Advisor to Watch** by AdvisorHub magazine. The news journal's second annual ranking highlights high performing advisors from across the country who have grown through uncertain markets. A range of advisors and firms were represented in the ranking with more than 374 firms participating and 700 finalists recognized.

Carlson strives to serve her clients with a steadfast commitment to helping them achieve their financial goals. She is also an integral part of the local business community with a keen focus on growing a thriving business. Nominees are required to have a minimum of seven years experience as an advisor, $100 million minimum AUM, and a clean regulatory record.

Ranking nominees and winners will be honored for their achievements in October at the Advisors to Watch Summit, a full-day event in New York City with an awards ceremony where special category awards will be presented. The Summit also features networking opportunities, where participants can receive valuable insights from fellow advisors on practice management and insights on innovations in wealth management from industry leaders.

"I'm honored to represent Fulcrum Financial Group as a 2023 Advisor to Watch, upholding our commitment to serve clients with independent and objective financial guidance," said Sarah Carlson Founder, and Private Wealth Advisor. "I'm also proud to contribute to my community Spokane, through my work."

"LPL Financial congratulates Carlson on being named an AdvisorHub 2023 Advisor to Watch, a recognition that demonstrates her dedication to meet evolving client needs during uncertain times," said Julian Lopez, LPL executive vice president of Independent Advisor Services, Relationship Management.

Carlson has been providing financial services to the community of Spokane for 26 years. The firm offers a full range of financial services, including retirement, divorce, and financial planning, individual money management, individual stocks and bonds, mutual funds, and more. Along with Carlson, Fulcrum Financial Group includes Jonna Damiano, RICP®, and Travis Messinger, CFP®.

Sarah Carlson is a financial professional affiliated with LPL Financial, a firm that supports financial advisors—whether they work as independent business owners, with an RIA firm, or at a financial institution—so they can deliver great advice and run a thriving business. LPL provides advanced technology, investment solutions, and an innovative range of services to best support financial professionals and their clients.

###

About Fulcrum Financial Group

Fulcrum Financial Group, a financial advisor in Spokane, was founded over two decades ago by Sarah Carlson. As a financial advisor in Spokane, she had a vision to start a company that would go beyond traditional wealth management, solving people's unique money problems while helping them live their ideal lives.

Over the years, the team has grown to become a close-knit group of intelligent, compassionate individuals with over 5 decades of collective experience. They enjoy collaborating to address the complexities of your wealth—and as a financial advisor in Spokane, serving you and your family with the kind of thoughtfulness and empathy you deserve.

About LPL Financial

LPL Financial Holdings Inc. (Nasdaq: LPLA) was founded on the principle that LPL should work for advisors and enterprises, and not the other way around. Today, LPL is a leader in the markets we serve, serving nearly 22,000 financial advisors, including advisors at approximately 1,100 enterprises and at approximately 550 registered investment advisor ("RIA") firms nationwide. We are steadfast in our commitment to the advisor-mediated model and the belief that Americans deserve access to personalized guidance from a financial professional. At LPL, independence means that advisors and enterprise leaders have the freedom they deserve to choose the business model, services and technology resources that allow them to run a thriving business. They have the flexibility to do business *their* way. And they have the freedom to manage their client relationships, because they know their clients best. Simply put, we take care of our advisors and enterprises, so they can take care of their clients.

Tracking Number 483140

Connect with Us!

For more information:
Sarah Carlson
509-747-2075
Sarah.Carlson@lplfinancial.com