

Sarah Carlson Named a 2021 'Top Wealth Advisor Mom' by Working Mother

Working Mother has partnered with SHOOK Research to recognize the top wealth advisor moms in the country.

SPOKANE, WA, UNITED STATES, October 14, 2021 /EINPresswire.com/ -- [Spokane, WA] – October 14, 2021 – Sarah Carlson, a financial advisor at Fulcrum Financial Group in Spokane, WA, has been recognized as a 2021 Top Wealth Advisor Mom, according to a list recently published by Working Mother magazine and SHOOK Research.

“We congratulate Sarah Carlson on being included in this year’s elite list of top working mothers. Not only is she deeply committed to her family, it’s clear that she has strong ambition as a

working mother and a passion for helping her clients work toward their financial goals. We are proud to call Sarah Carlson our partner, and we look forward to supporting her continued success,” said Angela Xavier, LPL Financial executive vice president, Independent Advisor Services.



Money does not solve problems, but good advice will.”

Sarah Carlson

To be included in the annual list, advisors must have children 21 years old or younger still living in their home. They are assessed on best practices and fundamental business components such as their service models, investing process, individual revenue stream, client

retention rate and assets under management*. The complete list of the 2021 “Top Wealth Advisor Moms” can [be viewed here](#).

Sarah Carlson is based in Spokane, WA and provides a full range of financial services, including investment opportunities, retirement planning, tax savings strategizing, legacy planning, estate



Fulcrum Financial Group are financial advisors who serve the community of Spokane, WA

planning, college savings, and divorce planning.

Carlson is an independent advisor affiliated with LPL Financial, the nation's largest independent broker-dealer* and a leader in the retail financial advice market, providing resources, tools and technology that support advisors in their work to enrich their clients' financial lives.

About Fulcrum Financial Group

Fulcrum Financial Group was founded over two decades ago by Sarah Carlson. 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, our team has grown to become a close-knit group of intelligent, compassionate individuals with over 5 decades of collective experience. We enjoy collaborating to address the complexities of your wealth—and serving you and your family with the kind of thoughtfulness and empathy you deserve.

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About LPL Financial

LPL Financial (Nasdaq: LPLA) was founded on the principle that the firm should work for the advisor, and not the other way around. Today, LPL is a leader** in the markets we serve, supporting more than 19,000 financial advisors, 800 institution-based investment programs and 450 independent RIA firms nationwide. We are steadfast in our commitment to the advisor-centered model and the belief that Americans deserve access to objective guidance from a financial advisor. At LPL, independence means that advisors have the freedom they deserve to choose the business model, services, and technology resources that allow them to run their perfect practice. And they have the freedom to manage their client relationships, because they know their clients best. Simply put, we take care of our advisors, so they can take care of their clients.

*SHOOK Research considered women advisors with a child 21 or younger still living at home. Ranking algorithm is based on qualitative measures derived from telephone and in-person interviews and surveys: service models, investing process, client retention, industry experience,



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review of compliance records, firm nominations, etc.; and quantitative criteria, such as assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Neither SHOOK nor Working Mother Media receives compensation from the advisors or their firms in exchange for placement on a ranking. Rankings are based on the opinions of SHOOK Research LLC and not indicative of future performance or representative of any one client's experience; the firm's research and rankings provide opinions for how to choose the right financial advisor. Past performance is not an indication of future results.

****Top RIA custodian (Cerulli Associates, 2019 U.S. RIA Marketplace Report); No. 1 Independent Broker-Dealer in the U.S (Based on total revenues, Financial Planning magazine June 1996-2021); No. 1 provider of third-party brokerage services to banks and credit unions (2020-2021 Kehler Bielan Research & Consulting Annual TPM Report); Fortune 500 as of June 2021**

Throughout this communication, the terms "financial advisors" and "advisors" include registered representatives and/or investment advisor representatives affiliated with LPL Financial LLC, an SEC registered broker-dealer and investment advisor.

LPL Financial, Working Mother, SHOOK Research and Fulcrum Financial Group are all separate entities.

Securities and advisory services offered through LPL Financial, a Registered Investment Advisor Member FINRA/SIPC.

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