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Jacob Fink Leaves Merrill Lynch to Launch Independent Practice with LPL Financial

BOSTON, MA – [Winthrop & Co.](#) is proud to announce that Jacob Fink has officially transitioned from Merrill Lynch to [LPL Financial](#), where he will continue building his independent wealth management practice based in Boston.

Jake represents a new generation of ambitious financial advisors—focused, strategic, and committed to serving a high-net-worth client base. Since the beginning of his career, his goal has been to build a business that serves clients with \$1MM+ in investable assets. But like many younger advisors at wirehouses, he found himself up against a system that made growth more difficult than it needed to be.

“Merrill seemed to resist the very strategy I was hired to pursue,” Jake shared. “From outdated prospecting restrictions to constant overreach from management, I knew I needed a platform that supported—not stifled—my vision.”

Now aligned with LPL Financial, Jake is taking full control of his business trajectory. With aspirations to build a \$100MM+ book of business in the coming years, Jake’s move reflects a clear shift toward independence and client-first thinking.

While he is open to collaborating with like-minded professionals for office space and operational support, Jake is committed to maintaining his status as a sole practitioner—delivering personalized guidance and building lasting client relationships on his own terms.

*Official Press Release of Winthrop & Co.
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