

2024 NTSA ELITE ADVISOR AWARDS



LARRY POOLE

Lincoln Investment,
Albemarle, NC

RETIREMENT ASSETS UNDER ADVISEMENT:

\$55,000,000 +

PARTICIPANTS SERVED: 898

SCHOOL DISTRICTS SERVED: 7

With over three decades of experience, Larry Poole has accomplished a great deal in the financial services industry. As a CRES Advisor, Financial Services Institute member, and Lincoln Investment Hall of Fame inductee, Larry has dedicated his career to advocating for better retirement policy and securing comfortable financial futures for all his clients.

Larry takes pride in being able to educate and empower individuals to prosper both personally and financially through every season of life. “For me, the cornerstone of this profession is the relationships I build with my clients. Whether I am managing the financial needs of a young couple or overseeing a client’s million-dollar portfolio, my foremost objective is to prioritize the best interests of my clients, placing their financial security and well-being at the forefront,” Larry says.

Through mentorship, Larry hopes his legacy will be defined by helping pave the way for the next generation of financial advisors. He maintains that while leadership in this field does involve managing assets, it also involves setting a precedent for future advisors of how they should go above and beyond to care for their clients.

“I believe in the power of guidance and the importance of passing on knowledge to ensure a strong and ethical industry. The legacy I wish to leave transcends mere financial success. It is about leading by example, consistently demonstrating strong ethics and values, and always prioritizing what is genuinely best for the client,” Larry states. “By mentoring responsibly, I hope to inspire a new generation of financial advisors who uphold the highest standards of integrity and client-centered service.”