LPL Financial Welcomes Strategic Financial & Tax Planning Services

Feb 14, 2019

CHARLOTTE, N.C., Feb. 14, 2019 (GLOBE NEWSWIRE) -- LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that Strategic Financial and Tax Planning Services (Strategic Financial) has joined LPL Financial's broker-dealer and corporate registered investment advisor platforms. The firm reported that its advisors served approximately $250 million of client brokerage and advisory assets* and joins from Royal Alliance, part of the Advisor Group network of broker-dealers.

Based in Hauppauge, N.Y., Guy Nicosia CFP® started his career as a high school physics teacher, providing tax and financial investment services to fellow teachers. Today, as a financial advisor with over 25 years of experience, his clientele has reached a broader group of professionals, families, small business and corporations. Under his leadership, he has helped to boost Strategic Financial's influence to over 2,000 clients*.

Along with two other advisors—his son, John Nicosia, and their partner, Matthew Barbis—they work as a team dedicated to helping their clients implement a comprehensive financial management and tax plan with the intent of being a lifelong partner in helping clients work toward financial independence and wealth.

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We welcome Guy and his team to LPL. We understand the effort it takes for advisors to establish independent businesses and build trust with clients to last a lifetime. We want our advisors to be able to focus on the things that matter most to them, like nurturing client relationships and ensuring the health of their business. As their partner, we provide the stability and support that empowers their business today and for the long run. We will continue to leverage our capital to make outsized investments back into their business, so they can address the evolving needs of their clients and maximize the value of their practice."

Read about other firms that recently joined LPL in the News and Media section of LPL.com.

About LPL Financial
LPL Financial is a leader in the retail financial advice market and the nation's largest independent broker-dealer**. We serve independent financial advisors 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. LPL.com

Securities and advisory services offered through LPL Financial, a registered investment advisor, Member FINRA/SIPC. Multop Financial is not an affiliate of LPL Financial, and offers tax services separate from and apart from LPL Financial.

*Based on prior business and represents assets that would have been custodied at LPL Financial, rather than third-party custodians. Reported assets and client numbers have not been independently and fully verified by LPL Financial.

**Based on total revenues, *Financial Planning* magazine June 1996-2018

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Source: LPL Financial Holdings, Inc.