LPL Financial and INC Advisors Welcome Bergen Point Wealth Management

May 25, 2021

CHARLOTTE, N.C. – May 25, 2021 – LPL Financial LLC today announced that financial advisors Craig Zaleck and Mark Hogan of Bergen Point Wealth Management have joined LPL Financial's broker-dealer, corporate registered investment advisor (RIA) and custodial platforms. They have aligned with Independent Network of Consultants & Advisors (INC Advisors), an existing large enterprise serving LPL-affiliated advisors. Zaleck and Hogan reported having served approximately $275 million in advisory, brokerage and retirement plan assets*. They join from First Allied, part of the Cetera network of broker-dealers.

Based in Bayonne, N.J., Zaleck and Hogan have been friends for more than 30 years, both starting their careers as CPAs. They specialize in providing tax-based financial strategies and wealth management advice to clients from all walks of life. With their move to LPL and INC Advisors, Zaleck and Hogan will officially merge their businesses and take a team approach to serving their clients. "We believe this new partnership puts us in a better position to assist with client requests and move the practice forward," Zaleck said.

LPL Financial's technology and financial strength

The team went through an extensive due diligence process prior to choosing LPL, citing the firm's technology and financial strength as deciding factors. "We believe LPL is highly committed to providing advisors with innovative technology to make it easier to do business. The industry is evolving quickly and we want to grow with a company that we have confidence in," Zaleck said. "We also appreciate that INC Advisors provides an additional layer of support and help with infrastructure. Ultimately, everything we've done has been with our clients' best interests in mind and we look forward to serving them further with LPL and INC as our partners."

Richard Dragotta, founder of INC Advisors, stated, "It is my pleasure to welcome Craig and Mark to the INC Advisor family. I share in their vision and look forward to helping them execute their growth plan for years to come. In today's competitive marketplace, successful advisors like Craig and Mark need turnkey technology, and marketing and planning solutions that create efficiencies and scalability. With our local infrastructure and experience, we are committed to supporting their continued success."

Scott Posner, LPL executive vice president, Business Development, said, "We welcome Craig and Mark to the LPL community, and congratulate INC Advisors on its continued growth. Our advisors are the focus of everything we do at LPL. We are committed to investing in innovative technology, business solutions and service experiences that can help them differentiate their practices and increase their value to clients. We look forward to a long partnership with Bergen Point Wealth Management."

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

Advisors, find an LPL business development representative near you.

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 18,000 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.

*** 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 1996-2020); No. 1 provider of third-party brokerage services to banks and credit unions (2019-2020 Kehrer Bielan Research & Consulting Annual TPM Report)*

*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.