



LPL Financial Welcomes CPC Financial Planning

Dec 18, 2019

CHARLOTTE, N.C. – Dec. 18, 2019 – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that seven financial advisors with CPC Financial Planning have joined LPL Financial's broker-dealer and corporate registered investment advisor (RIA) platforms. The advisors reported having served approximately \$390 million in brokerage, advisory and retirement plan assets*. They join from Royal Alliance, part of the Advisor Group network of broker-dealers.

Based in King of Prussia, Penn., CPC Financial Planning's team of financial advisors includes Rich Capasso CFP®[®], Earl Clairmont CFP®[®], John Paciello CFP®[®], Andy Gilinsky CFP®[®], Charlie Wilensky CFP®[®], Rick Clairmont and Frank Imperial CFP®[®]. All are also certified public accountants affiliated with Clairmont, Paciello & Co., P.C. CPA firm. They are assisted by three office support members. The team takes a holistic view of each client's financial situation, offering financial planning, investment advice and tax solutions to executives, professionals and small business owners.

"We are glad to be a part of LPL and look forward to future growth with the firm," Capasso said. "LPL takes a proactive role in helping its advisors. We appreciate that commitment and share that approach with our own clients. Everything we do here is client-centric. Our advisors set out to gain a deep understanding of each person's objectives, risk tolerance and timeline before developing comprehensive, personalized financial plans."

CPC Looks to LPL's Integrated Technology

The group turned to LPL Financial seeking integrated technology to enrich the client experience and to reduce costs. "LPL's ClientWorks technology is aligned with our clients' needs and growing expectations. We are eager to begin using the Client Goals tool in ClientWorks Connected to help us have meaningful conversations as we map out our clients' financial goals and objectives," Capasso said.

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We extend a warm welcome to CPC Financial Planning. As financial advisors seek new ways to enrich the experience for their clients, we are committed to making investments in differentiated capabilities that can help them meet the relevant needs of their markets. Client Goals is a great example of that. We're thrilled the team finds value in the tool and its capacity to quickly and easily create personalized reports for their clients. We look forward to being this team's partner for years to come as they continue to grow their practice."

Read about other firms that recently joined LPL in the [LPL Financial News and Media section](#) of LPL.com.

Advisors, learn how to take a [proactive approach in the progression](#) and future planning of your firm.

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.

Securities and Advisory services offered through LPL Financial, a registered investment advisor. Member FINRA / SIPC.

CPA related services through Clairmont, Paciello & Co.

Clairmont, Paciello & Co. is a separate legal entity and not affiliated with LPL Financial. LPL Financial does not offer tax advice or CPA related services.

*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 1996-2019