LPL Financial

LPL Financial Welcomes Financial Advisor Mary Pascarella

Nov 8, 2018

CHARLOTTE, N.C – Nov. 8, 2018 – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that Mary Pascarella, founder of Perennial Financial Planning, has joined LPL's broker-dealer and corporate registered investment advisor (RIA) platforms. She reported having served approximately $110 million of client brokerage and advisory assets*. She joins LPL from Cetera.

"I have been in the business 27 years, always with the same partner," said Pascarella, a mother of three and grandmother of seven. "But I believe it's never too late in life to seek opportunity and make it part of the fiber of who you are. Being willing to adapt is important to stay relevant and serve the needs of my clients. I have a responsibility to bring the best resources and tools to the table for my clients. I believe LPL is the right partner to support my business and my clients."

Based in Parsippany, N.J., Perennial Financial Planning includes Pascarella and her sister, Bernadette Sheehan, who provides office support. Pascarella said she chose LPL to gain access to enhanced technology that could increase efficiency in her practice. "Being able to centralize our workflow and systems within ClientWorks is a huge differentiator. We can access service support, take advantage of LPL's self-clearing capabilities across different platforms in one place and also easily generate client proposals and reporting. The platform is really user friendly, too. Bernadette is already proficient with ClientWorks in less than a month," Pascarella said.

"We are honored Mary chose LPL," said Rich Steinmeier, LPL Financial managing director and divisional president, Business Development. "Mary's success as an independent business owner is commendable. We are proud she takes seriously our commitment to making ongoing investments in technology and innovative capabilities to deliver enhanced value to her clients. On behalf of the LPL family, we welcome Mary and her family to the firm and look forward to supporting her continued success."

Read about other woman-led firms that recently joined LPL:

Arrow & Bow, founded by Elizabeth Leventis and based in Charlotte.

The Financial Planning Department, Inc., an all-woman team based in California.

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.

*Based on prior business, as of Sept. 30, 2018, and represents assets that would have been custodied at LPL Financial, rather than third-party custodians. Reported assets have not been independently and fully verified by LPL Financial.

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

LPL Financial and Perennial Financial Planning are separate entities.