LPL Financial Welcomes HPK Provident Advisors

December 2, 2021

CHARLOTTE, N.C., Dec. 02, 2021 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that HPK Provident Advisors has joined LPL Financial's broker-dealer, corporate registered investment advisor (RIA) and custodial platforms. The team reported having served approximately $230 million in advisory and brokerage assets*, and joins LPL from FSC Securities Corporation, part of the Advisor Group network of broker-dealers.

The family-led business dates back to the early 1960s when Ron Zucchelli founded the Western Pennsylvania-based practice. His son-in-law and grandson, David Harper and Colin S. Harper CFP®, followed his footsteps as financial advisors and are honored to continue his legacy after his 2012 retirement. They were joined shortly after by fellow advisors Michael Kutch CFA and Brian Paluso CFP®, CLU, RICP, AIF, and the firm has expanded to include another registered office in Sarasota, Fla.

"The investment landscape has grown incredibly complex over the years, so we've brought together a team of advisors who each bring different specialties to the firm. We take a collaborative approach to helping each and every client to pursue their goals, working through our exclusive DREAM financial planning process: Discover, Reduce Stress, Expectations, Action Items and Moving Forward," David Harper said.

As the team continues to grow and provide clients with elevated service experiences, they turned to LPL for the next chapter of their journey. "We were looking for additional resources and innovative technology with single sign-on, and we found that with LPL. The move has simplified so many of our day-to-day tasks, and we expect to get back a couple hundred, if not thousands, of hours per year so we can enjoy doing what we do best: helping our clients," Harper said.

Scott Posner, LPL executive vice president, Business Development, stated, "We extend a warm welcome to David, Colin, Michael and Brian, and we're honored to support the meaningful work they are doing to continue Ron's legacy. We are committed to investing in innovative capabilities and tools that can help advisors differentiate their practice and increase their value to clients. Technology plays an integral role in our advisors' practices, and we do more than just deliver leading tools. LPL uses integrated workflows and innovative business solutions to create a seamless user experience so advisors have greater capacity, more ease and additional resources to be able to deliver more value to their clients. We look forward to a long-lasting relationship with HPK Provident Advisors for years to come."

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 19,000 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 personalized 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, 2020 U.S. RIA Marketplace Report); No. 1 Independent Broker-Dealer in the U.S (Based on total revenues, Financial Planning magazine 1996-2021); No. 1 provider of third-party brokerage services to banks and credit unions (2020-2021 Kehrer Bielan Research & Consulting Annual TPM Report); Fortune 500 as of June 2021*

*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.

Securities and advisory services offered through LPL Financial LLC, an SEC- registered broker-dealer and investment advisor. Member FINRA/ SIPC

Throughout this communication, the terms "financial advisors" and "advisors" are used to refer to registered representatives and/or investment advisor representatives affiliated with LPL Financial LLC. We routinely disclose information that may be important to shareholders in the "Investor Relations" or "Press Releases" section of our website.

HPK Provident Advisors and LPL Financial are separate entities.

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