LPL Financial

# LPL Financial, Gladstone Welcome Father-Daughter Team

January 18, 2022

CHARLOTTE, N.C., Jan. 18, 2022 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors John and Jennifer Tarantino have joined LPL Financial's broker-dealer, corporate registered investment advisor (RIA) and custodial platforms, aligned with Gladstone Wealth Partners, a large enterprise on LPL's hybrid RIA platform. They reported to LPL that they serve approximately $250 million in advisory, brokerage and retirement plan assets,* and join from Morgan Stanley.

The father-daughter team has more than 50 years of combined experience, applying their family values of integrity, transparency and empathy to help families in this generation and the next. With a background in teaching, John's specializes in simplifying complex issues to help clients truly understand their financial landscape. Jennifer joined the practice in 2015 after gaining industry acumen working for other firms, bringing new thinking to help reach the next generation of clients. Together, they take a financial planning approach to help clients define what's most important in their lives.

"For many people, their most important asset isn't held in a portfolio. It's often the time they spend with loved ones, the enjoyment they find in pursuing their passions and the sense of comfort they find within their community," John said. "Whatever our clients care about most, we believe that a solid financial plan will help them realize a vision for their future. Our personalized strategies are designed to help each client work toward meeting their lifestyle and goals."

After much reflection and due diligence, the team determined that the independent model best suited their clients' growing needs. They turned to Gladstone Wealth Partners and LPL Financial to breakaway from the wirehouse environment for the next chapter of their business. They will start their new practice in Florham Park, N.J.

"Being a family team, we want to help our clients the way we would help our own family. Going independent really takes that thinking to the next level and beyond. We can make decisions in our clients' best interests without having organizational influence," Jennifer said.

John added, "Gladstone gives us a sense of community. They treat us like family, taking things off our plate so we can spend more time with clients. We also appreciate the benefits of joining LPL, a leading wealth management firm. The combination of Gladstone and LPL provides us with access to knowledgeable and experienced team members and robust resources designed to help us differentiate our business and expand our offerings and service."

Richard Frick, Managing Partner and CEO of Gladstone Wealth Partners said, "We welcome John and Jen to the Gladstone family, and are honored they put their trust in us to help with their transition to independence. Our relationship with LPL delivers value by providing the resources and innovative solutions that help us and our advisors evolve. We look forward to supporting the entire Tarantino team and helping in their continued growth."

Scott Posner, LPL executive vice president, Business Development, said, "We extend a warm welcome to John and Jen, and congratulate them on the launch of their independent practice. As a partner with scale, we are committed to supporting our advisors' ability to meet their clients' expectations for differentiated service experiences and access to sophisticated wealth management solutions. We also deliver robust resources and business solutions to help independent business owners operate efficiently and build a business with value. We are honored to support Gladstone and the Tarantinos and look forward to a long-lasting partnership with both."

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.

** Value approximated based on asset and holding details provided to LPL from the year 2021*

***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 June 1996-2020); 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*



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