Bodnar Financial Advisors Joins LPL Financial

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CHARLOTTE, N.C., Oct. 03, 2022 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that Bodnar Financial Advisors has joined LPL Financial's broker-dealer, RIA and custodial platforms. The team reports serving approximately $300 million in advisory, brokerage and retirement assets*, and joins LPL from Cambridge Investment Research.

Financial advisor John Bodnar, CFP®, CIMA®, founded Bodnar Financial Advisors in 1988 as a full-service financial firm that helps clients navigate their lives with a sense of financial confidence. Based in Florham Park, N.J., the team has grown to include financial advisor Justin Esposito, office manager Lorraine Figarelli, and client services associates Jane Esnes and Danielle Mazzocchi.

The team's motto is: life's too short to worry about money. Bodnar and the team have developed a flexible, friendly and professional style that puts clients at ease as they collaborate together to develop financial strategies for major life events including marriage, kids, death, divorce, layoffs, retirement, downsizing and more. "Financial planners often see clients in their most vulnerable moments, and it's nice to know that while I'm looking out for my clients, LPL Financial is looking out for my team and making sure we have the tools and resources to do the best job possible," Bodnar says.

At the heart of the team's approach is a deep commitment to fiduciary principles and a desire to foster authentic personal connections with clients and their loved ones. In fact, several families receiving advice from John today are the children and grandkids of his original clients. Bodnar said, "As we move to LPL Financial, we are taking these timeless values with us: listening, getting to know each individual client, identifying their personal goals, and building custom financial plans and investment strategies that will evolve with changing life circumstances."

It takes planning, but also client education and behavioral investment counseling. Esposito is a former NCAA Division I championship baseball pitcher and knows firsthand the value of a good coach. He motivates clients to stay on track and to keep working their investment plans despite the panics of the news cycle. He called the move to LPL "the next step in our firm's growth and making our team stronger."

Bodnar added, "LPL is independent, which gives us continued flexibility to create portfolios that focus on our clients' unique financial needs. They have the size and the tools we need to reach the next step in our growth without sacrificing the freedom in the range of services we provide. LPL Financial is a true innovator in the independent broker-dealer space."

Scott Posner, LPL Executive Vice President, Business Development, added, "We welcome Bodnar Financial Advisors to the LPL community and are honored they turned to us to help them build their ideal practice. LPL is a champion in the marketplace for financial advisors and we are centered on empowering advisors so they can do what's best for their clients. We do this by delivering the integrated tools, services and differentiated experiences, all designed to help advisors expand their value proposition and build stronger connections with clients."

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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 nearly 21,000 financial advisors, and approximately 1,100 institution-based investment programs and 500 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 year-end 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 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 Company since June 2021. LPL and its affiliated companies provide financial services only from the United States.*

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.

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