Financial Advisor David J. Dobrusin Joins LPL Financial

Jan 9, 2023

CHARLOTTE, N.C., Jan. 09, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq:LPLA) announced today that financial advisor David J. Dobrusin has joined LPL Financial's broker-dealer, RIA and custodial platforms. Having served approximately $200 million in advisory, brokerage and retirement plan assets*, Dobrusin joins LPL from Cambridge Investment Research.

Based in Arizona, Dobrusin is a Certified Public Accountant and Certified Financial Planner™, having founded a tax and accounting firm prior to joining the investment industry. Dobrusin brings a practical combination of tax planning and financial management to help clients maximize investment goals and minimize tax liability.

"We are an experienced full-service financial firm committed to being an integral part of each client's financial management team," Dobrusin said. "As a tax-efficient investment firm, clients appreciate the efficiency of coordinated services. It is critical to discuss complex tax and investment strategies clearly and in a manner that resonates with our clients to help them navigate markets and these current financial times."

"It was crucial for the team to maintain its independence which allows us to continue to act in our clients' best interests. LPL has the size and scale to enable us access to world-class resources along with integrated resources and alternatives for our clients, while also maintaining their freedom of choice," Dobrusin said.

Scott Posner, LPL Executive Vice President, Business Development, added, "We welcome David and his team to LPL and are proud he recognized us as the ideal partner for the future of his business. Advisors need robust resources to help differentiate the client experience and nurture a thriving business, and we believe our innovative capabilities are a key enabler for both. We look forward to supporting Dobrusin Financial for years to come."

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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 more than 21,000 financial advisors, including advisors at approximately 1,100 institution-based investment programs and at approximately 500 registered investment advisor ("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 2022.*

***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 1996-2022); among third-party providers of brokerage services to banks and credit unions, No. 1 in AUM Growth from Financial Institutions; No. 1 in Market Share of AUM from Financial Institutions; No. 1 in Market Share of Revenue from Financial Institutions; No. 1 on Financial Institution Market Share; No. 1 on Share of Advisors. (2021-2022 Kehrer Bielan Research & Consulting Annual TPM Report). Fortune 500 as of June 2021.*

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