LPL Financial Welcomes Blue Sky Wealth Management

Jun 22, 2023

CHARLOTTE, N.C., June 22, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Joe Di Biasi and Greg McElheny, along with the team at Blue Sky Wealth Management, have joined LPL Financial's broker-dealer, RIA and custodial platforms. They reported having served approximately $275 million in advisory, brokerage and retirement plan assets*, and join LPL from Woodbury, part of Osaic (formerly Advisor Group).

Located in Greenwood Village, Colo., Blue Sky Wealth Management was formed in 2016 when Di Biasi and McElheny merged their individual practices. With more than four decades of wealth management experience between them, the pair prides themselves on developing personalized strategies to address their clients' financial goals and objectives, using the most efficient methods available. "No one strategy works for everyone, which is why each client gets our undivided attention – from planning to execution to follow-up," McElheny said.

It was their client-first commitment that led the Blue Sky Wealth Management team – which also includes advisors Leor Getzel and Bill Simmermon – to LPL Financial.

"As this industry continues to evolve, it's important to partner with a leading wealth management firm to help us keep up with our clients' growing needs. It's clear that LPL is a forward-thinking and progressive partner that understands the importance of investing in innovative and integrated technology to help us work efficiently and provide an exceptional client experience," said Di Biasi.

McElheny, who was with LPL earlier in his career, said returning to LPL was the right decision for their firm. "LPL offers our team the opportunity to chart our own course. They offer best-in-class tools and technology, as well as differentiated service experiences. We are confident this partnership will allow us greater flexibility to simultaneously focus on our clients and grow our business."

Scott Posner, LPL Executive Vice President, Business Development, added, "We welcome Joe, Greg and the entire team at Blue Sky Wealth Management to the LPL community. We are inspired by their client-centered philosophy and are committed to supporting their goal of growing their business by providing them with innovative M&A resources, integrated capabilities and access to a wide range of non-proprietary investment products. We wish Blue Sky Wealth Management great success with the next chapter of their business."

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About LPL Financial
LPL Financial Holdings, Inc. (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 enterprises and at approximately 500 registered investment advisor ("RIA") firms nationwide. We are steadfast in our commitment to the advisor-mediated advice 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.*

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