LPL Financial

Financial Advisor Bart DeLuca Joins LPL Financial To Open Maryland Office With Intrua Fianancial

Jul 11, 2023

CHARLOTTE, N.C., July 11, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Bart DeLuca CFP®, CIMA® has joined LPL Financial's broker-dealer and custodial platforms, aligned with existing RIA firm Intrua Financial. He reported having served approximately $165 million in advisory, brokerage and retirement plan assets*, and joins LPL from Raymond James Financial Services. With the move, DeLuca will expand Intrua Financial's reach in Maryland by opening its first location in the Baltimore suburb of Fulton.

During his 22-years in the business, DeLuca has built a successful career by planning sustainable retirements for the families he works with.

"There are very few professions where you get to see the impact of your work from start to finish," he said. "I really enjoy meeting my clients for the first time when they start thinking about retirement, helping them put together a plan that works for them, and then watching their confidence grow along the way as they work to secure their financial futures."

Looking for a strategic partner to help him provide an elevated client experience, DeLuca researched several wealth management firms before selecting Intrua and LPL as the best fit for his long-term career goals.

"Before beginning my search, I put together a checklist of things I was looking for in a partner. It included things like the ability to operate independently, an RIA platform for advisory assets, brokerage options for legacy brokerage assets and robust back office support," DeLuca said. "After multiple visits with various members of the Intrua team, including Intrua CEO Andrew Keller, I decided Intrua and LPL was the best fit for my practice. By partnering with Intrua I have the freedom to serve my current clients and grow my business on my terms, while enjoying Intrua's back office help and support. A tremendous plus is that Intrua's services are backed by LPL's innovative technology and integrated capabilities. It's truly the best of both worlds."

Scott Posner, LPL Executive Vice President, Business Development, stated, "We welcome Bart to the LPL community and congratulate Intrua Financial on growing its network of quality advisors. At LPL, we understand what advisors need to run a successful firm, and we are committed to investing in innovative capabilities and resources necessary to help them achieve that success. We wish Bart all the best on this next chapter of his career."

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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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