LPL Financial Welcomes Syracuse Wealth Management

Jul 19, 2023

CHARLOTTE, N.C., July 19, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that Syracuse Wealth Management has joined LPL Financial's broker-dealer, RIA and custodial platforms. The team of six advisors reported having served approximately $250 million in advisory, brokerage and retirement plan assets*, and join LPL from Cadaret, Grant & Co., Inc.

Based in Liverpool, N.Y., with branches in Syracuse and Utica, Syracuse Wealth Management is led by OSJ Gary Lucas along with partners Ronald Pratt, Jr. and Brenda Monk, who have a combined 75 years of experience in the financial services industry. They are joined by a robust team that includes branch financial advisors Michael J. Cook, Donald Jaquin and Jonathan Lovecchio, executive assistant and partner Audrey Hennessy, as well as their support staff. Together the group takes a focused and individualized approach to financial planning.

"No two people are the same, which is why everyone needs their own personalized strategy," Lucas said. "Our priority is to understand where our clients are coming from and then design a plan to help them meet their financial objectives. Whatever their financial goals might be, it's our job to help them get there."

It was their client-first commitment that led Syracuse Wealth Management to LPL Financial.

"We interviewed a number of firms, but after our meeting with LPL Financial it was clear they were the right fit for our business," Lucas said. "LPL's best-in-class tools and technology will allow us to elevate our client experience. A great example of this is LPL's ClientWorks. Going from using multiple dashboards and having to remember numerous logins to one streamlined platform will help us increase our efficiencies and productivity. Plus, the fact LPL is self-clearing is an added bonus. Everything LPL offers shows they are committed to taking care of advisors, so we can take care of our clients. And that's ultimately what this move is about – doing the best thing for our clients."

Scott Posner, LPL Executive Vice President, Business Development, added, "We welcome Gary, Ronald and Brenda and the entire team at Syracuse Wealth Management to the LPL community. We applaud their strategic and focused approach to help their clients work toward their financial objectives, and we are proud to support them with differentiated technology, business solutions and innovative wealth management platforms designed to create an enhanced client experience. We look forward to a long and successful partnership with Syracuse Wealth Management."

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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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