



## LPL Financial Welcomes Financial Advisor Daria Schumacher

Oct 23, 2023

CHARLOTTE, N.C., Oct. 23, 2023 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) (Nasdaq:LPLA) announced today that financial advisor Daria Schumacher CFP®, CLU®, RICP®, ChFC®, NISSA® has joined LPL Financial's broker-dealer, RIA and custodial platforms, aligned with existing firm Balmville Wealth Group (BWG). She reported having served approximately \$150 million in advisory, brokerage and retirement plan assets\*, and joins LPL from Cetera Investors.

Based in Latham, NY, Schumacher's desire to live life to the fullest inspires the work she does each day to help clients navigate the intricacies of the investment world and retirement planning. As "someone who loves math and loves people," Schumacher said financial planning captured her interest early on as a teenager growing up in Poland.

"My goal is to help clients through the big moments in life, taking into consideration all the pieces of each client's financial puzzle before creating individualized plans that clients can understand and follow consistently," said Schumacher, who is joined by licensed assistant Sarah Ryle. "Retirement planning in particular is filled with complex and interrelated decisions, so I take a proactive approach to provide clients with financial education and support."

As she approaches 20 years in the financial services industry, Schumacher recognizes the need for a new wealth management partner to help elevate her practice and give her more control over her business.

"LPL offers innovative technology and more options to help me service my clients better," Schumacher said. "I'll also have true independence to control my future and create differentiated experiences for clients. There are so many things we can't control, such as market performance and inflation, but the things I can control—such as building solid financial plans, strategies and great long-term client relationships—are keys to success. I'm certain this move to LPL and BWG will help my practice thrive."

Schumacher also said she appreciates the localized support, connections and additional layer of resources from BWG.

"Daria is a highly intelligent, client-focused advisor," said BWG Chairman and Founder Michael Vela. "I've had the pleasure of watching her grow in the business from day one to becoming the owner of an amazing practice. We at BWG are looking forward to supporting Daria and her desire to continue making a difference in the world for her clients, and bringing her practice to the next level."

Scott Posner, LPL Executive Vice President, Business Development, stated, "We extend a warm welcome to Daria, and congratulate BWG on growing its advisor community. As a partner with scale, we will continue to invest in capabilities and solutions designed to help advisors differentiate their businesses, bring added value to their clients and win in their markets. We look forward to a long-lasting and successful relationship with both Daria and BWG."

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LPL Financial Holdings Inc. (Nasdaq: LPLA) was founded on the principle that LPL should work for advisors and enterprises, and not the other way around. Today, LPL is a leader in the markets we serve, serving nearly 22,000 financial advisors, including advisors at approximately 1,100 enterprises and at approximately 550 registered investment advisor ("RIA") firms nationwide. We are steadfast in our commitment to the advisor-mediated model and the belief that Americans deserve access to personalized guidance from a financial professional. At LPL, independence means that advisors and enterprise leaders have the freedom they deserve to choose the business model, services and technology resources that allow them to run a thriving business. They have the flexibility to do business *their* way. And they have the freedom to manage their client relationships, because they know their clients best. Simply put, we take care of our advisors and enterprises, so they can take care of their clients.

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*\*Value approximated based on asset and holding details provided to LPL from year-end 2022.*

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