# Financial Advisor Carmen Pontelandolfo joins Linsco by LPL

Oct 31, 2023

SAN DIEGO, Oct. 31, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Carmen Pontelandolfo has joined LPL's employee advisor channel, Linsco by LPL Financial, to launch CJP Wealth Management of LPL Financial. He reported having served approximately $135 million in advisory, brokerage and retirement plan assets* and joins LPL from Morgan Stanley.

Based in his hometown of Marlton, N.J., Pontelandolfo is a seasoned financial professional with over three decades of industry experience. He was inspired to become an advisor after the 1987 Stock Market crash, choosing a profession that combines his interest in economics with his passion for relationship building and helping others. Pontelandolfo is joined by Client Services Associate Dana Debardeladen, who shares his core values and mission to treat clients as family.

"We are deeply committed to going above and beyond to help guide clients through all of the major stages of their financial lives, from building wealth to retirement planning to educating their children ahead of any potential wealth transfer," Pontelandolfo said. "We use a broad range of financial tools to help clients manage, grow and preserve wealth, taking a personalized approach because no two clients are the same."

Looking for more freedom and flexibility to serve clients without outside influences, the team turned to Linsco by LPL.

"I'm at a great place in my career and have a good service model in place, but as the industry shifts, I recognized my clients would be better served in a more independent environment," Pontelandolfo said. "My business is incredibly family-focused so it's important that I'm at place where I can truly put clients' best interests first, just like I would if they were my family."

**Why Linsco by LPL Financial**

With Linsco, Pontelandolfo and Debardeladen have the best of both worlds: LPL's sophisticated wealth management platform and leading technology capabilities, as well as a blend of reliable business strategy services designed to help advisors run thriving practices. Linsco serves financial advisors seeking the core tenets of independence, including owning their client relationships and having flexibility to run their practice on their own terms. However, business operations such as real estate, health and wellness benefits, compliance and human resources are handled by a dedicated Linsco support team, freeing up more time for advisors to focus on serving their clients.

"LPL is focused on supporting advisors and helping them be successful. We appreciate all of the innovative resources that we now have available to evolve our practice on our terms and create elevated service experiences for our clients," Pontelandolfo said.

LPL Executive Vice President, Business Development, Scott Posner said, "We welcome Carmen and Dana to the Linsco community. We congratulate them on the launch of CJP Wealth Management and look forward to a long-lasting and successful relationship with the team. With LPL's support, more advisors are recognizing the importance of freedom as they seek ways to differentiate themselves and enhance the client experience. Linsco grants advisors true client ownership and the freedom to manage and grow their relationships – and business – as they see fit."

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**About LPL Financial**

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 more than 22,000 financial advisors, including advisors at approximately 1,100 enterprises and at approximately 560 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.



Throughout this communication, the terms "financial advisors" and "advisors" are used to refer to registered representatives and/or investment advisor representatives affiliated with LPL Financial.

We routinely disclose information that may be important to shareholders in the "Investor Relations" or "Press Releases" section of our website.

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

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