Father-Son Financial Advisors Join Linsco by LPL to Launch Zambri Financial

Nov 13, 2023

CHARLOTTE, N.C., Nov. 13, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq: LPLA) announced today that financial advisors Anthony S. Zambri, CFP®, CLU®, ChFC®, APMA® and his son Anthony V. Zambri, APMA® have joined LPL's employee advisor channel, Linsco by LPL Financial, to launch Zambri Financial. They reported having served approximately $180 million in advisory, brokerage and retirement plan assets* and join LPL from Ameriprise.

The Melville, N.Y., practice represents three generations of Zambris in financial services. They built the business organically over the years through referrals and financial educational events.

"My father has been an advisor for 35 years, and both of my grandfathers have been in this industry since the 1970s. I've been lucky enough to witness firsthand the lasting value and relationships that can be forged through this business," said Anthony V., a recipient of the 2022 30 Under 30 award from Long Island Business News.

"Being able to meet new people on a regular basis and help them work toward their financial goals has been incredibly rewarding," Anthony S. said, noting the team primarily works with retirees, families and business owners. "We get to know our clients on a deep level, understanding everyone's situation is different and they all require unique solutions. We are happy and honored to play a part in that dream for our clients."

Why Linsco by LPL Financial

The father-son duo, who are joined by longtime Client Services Associate Kimberly Scollo, will be the anchor tenants in the first Linsco office on Long Island. They look forward to helping set the tone and culture for the office.

"We looked around the financial landscape and really appreciated the entrepreneurial nature of LPL, especially with its Linsco W2 employee advisor model. It brings me back to my roots," Anthony S. said. "Linsco offers a combination of dedicated resources and a wide array of solutions that will help us provide clients with an elevated level of service they deserve. We're able to put our clients' interests at top of mind and serve them the way we see fit."

Linsco was created for financial advisors seeking the core tenets of independence, including owning their client relationships and having the flexibility to run their practice on their own terms. With Linsco, advisors have access to LPL's integrated wealth management platform and robust business resources, along with the additional benefits of having support from an experienced branch management team and other dedicated consultants.

LPL Executive Vice President, Business Development, Scott Posner said, "We extend a warm welcome to the Zambris and congratulate them on this next chapter of their business. In today's environment, advisors who run their business benefit from an additional layer of support for day-to-day operations so they have more time to spend where they provide the most value: in front of clients. We are honored that this family team turned to Linsco for that strategic, turnkey support. With our capacity to invest and innovate, we can deliver solutions and capabilities designed to help advisors build their perfect practice and thrive while serving the needs of their clients."

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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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