LPL Financial

LPL Financial Welcomes Oak Tree Financial Group

Dec 11, 2023

SAN DIEGO, Dec. 11, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Michael Gandet, Jr., BFA™, Mark Choinski, BFA™ and Arthur Sisco, CPA, PC of Oak Tree Financial Group have joined LPL Financial's broker-dealer, RIA and custodial platforms. They reported having served approximately $130 million in advisory, brokerage and retirement plan assets*, and join LPL from Securities America, part of the Osaic network (formerly Advisor Group).

Headquartered in Fairfield, Conn., with offices in Manahawkin, N.J., Poughkeepsie, N.Y. and Westwood, N.J., the team has more than 75 years of combined financial services experience. They have built a reputation as a close-knit firm that works together to help clients work toward their financial goals through financial education and open communication.

"It's incredibly important that my clients have a basic understanding of the products and services we provide and as a financial advisor, it's my job to help provide that education," Gandet said. "When I'm working with a new client I always say,'You may not fully understand some of the technical concepts right now, but three years from now you're going to be finishing my sentences.' Watching our clients become more confident when it comes to their finances is one of the most rewarding parts of my job."

Looking to streamline business efficiencies and elevate their client experience, the Oak Tree team – which also includes Office Manager Lisa Molwitz and associate Christopher Gandet, who is Michael's son – turned to LPL Financial.

"What really impressed us about LPL is that they are forward-thinking and progressive and constantly looking for ways to help advisors serve their clients better," Gandet said. "As consolidation continues to increase in the industry, many of my industry peers have made the switch to LPL and it's easy to see why. LPL offers specialized support, top-notch technology and insightful market research that we can use to support our clients and grow the business."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Michael, Mark, Arthur, Lisa and Christopher to the LPL community and applaud their client-centric commitment. At LPL, we understand the desire to provide a best-in-class client experience and we are committed to investing in innovative capabilities and business solutions designed to help advisors grow their business and support their clients their way. We look forward to supporting Oak Tree Financial Group for years to come."

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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, 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 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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Media Contact:
Media.relations@LPLFinancial.com
(704) 996-1840
Tracking #: 512882