LPL Financial Welcomes Goldman Group, Inc.

Jan 11, 2024

SAN DIEGO, Jan. 11, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Marvin Goldman has joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported having served approximately $120 million in advisory, brokerage and retirement plan assets*, and joins LPL from Cadaret, Grant & Co.

Based in Roseland, N.J., Goldman started his career in the 1960s, initially growing his business by servicing orphaned accounts before building a large referral network. Always the entrepreneur and independent at heart, he founded Goldman Group in the early 1970s and expanded his reach to clients throughout the country.

"I've made personal connections and built my business by providing investment advice and wealth management to clients across the board, working closely with many second and third generations within the same family," said Goldman.

Looking for more innovative resources, as well as the ability to create a more robust business continuity plan, Goldman turned to LPL Financial for the next chapter of his business.

"LPL is a Fortune 500 company and the largest independent wealth management firm in the industry**, with state-of-the-art technology that my clients will benefit from," Goldman said. "I look forward to networking with other like-minded advisors and building out a plan to take care of my clients for generations to come."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Marvin to LPL and commend his commitment to taking care of his clients. We understand what advisors need to build a successful firm, and we are committed to investing in the resources necessary to help them achieve that success. At LPL, we meet advisors where they are in the evolution of their practice—whether that's growing their firm or transitioning into succession—and deliver the support and services that are right for them and will add value to their business and 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.

**Value approximated based on asset and holding details provided to LPL from year-end 2023.*
***As reported by Financial Planning Magazine, 1996-2023, based on total revenue.*

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