



## LPL Financial Welcomes CoastPoint Financial, LLC

Feb 15, 2024

SAN DIEGO, Feb. 15, 2024 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that Financial Advisors Mark Zafereo and Anthony Burgess, Client Associate Crystal Simmons and Office Manager Sandie Totah Loos have joined LPL Financial's broker-dealer, RIA and custodial platforms to launch an independent practice, CoastPoint Financial, LLC. The firm reported serving approximately \$150 million in advisory, brokerage and retirement plan assets\* and joins LPL from Wells Fargo Advisors.

Based in Victoria, Texas, both advisors had an early appreciation for investments but took unique paths into the industry. Zafereo was a tax accountant early in his career and then served for 22 years as a chief financial officer and office manager for a private family operation prior to becoming an advisor in 2011. Burgess worked as a security supervisor for the state prison system before shifting to financial services in 2004. They teamed up in 2014, recognizing that their combined skillsets would be instrumental in providing greater service for their approximately 400 clients. Simmons joined the team in 2021 after working for 10 years as a personal banker, and Loos joined the group in 2023 after 28 years as owner/ director of a childcare center.

"We love what we do, which is helping our clients make financial decisions that benefit them throughout their entire lifecycles," Zafereo said. "We take a personalized approach to servicing each client, looking at their complete financial situation, risk tolerance and goals, to produce a strategy that aligns with their unique needs."

Seeking independence, control of their business and the ability to service clients regardless of the size of their account, the team turned to LPL.

"We did extensive due diligence prior to making this move and were deeply impressed with LPL's position in the marketplace as a Fortune 500 Company with more than 22,000 advisors and \$1.3 trillion in assets\*\*," Burgess said. "What really stood out is LPL's commitment to taking care of advisors so we can focus on our clients. We were not going to move unless we saw that our clients would be better served. We believe that will happen here at LPL and look forward to the next chapter of our business."

Scott Posner, LPL Executive Vice President, Business Development, stated, "We welcome Mark and Anthony to the LPL community and congratulate them on the launch of their independent practice. With increased freedom and flexibility, financial advisors who choose LPL gain more ability to work smarter and on their own terms. Advisors are our No. 1 focus, and we are steadfast in our commitment to provide them with innovative capabilities and other wealth management resources that deliver value and help meet the relevant needs of their clients. We look forward to supporting CoastPoint Financial for years to come."

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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 570 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.

Securities and Advisory services offered through LPL Financial LLC ("LPL Financial"), a registered investment advisor. Member FINRA/SIPC. LPL Financial and its affiliated companies provide financial services only from the United States. CoastPoint Financial, LLC and LPL Financial are separate entities.

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 end of year, 2023.

\*\* Brokerage and advisory client assets, serviced or custodied

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