LPL Financial Welcomes Summit Planning Group

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SAN DIEGO, July 15, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that the advisors with Summit Planning Group have joined LPL Financial's broker-dealer, RIA and custodial platforms. The team reported having served approximately $750 million in advisory, brokerage and retirement plan assets* and joins LPL from Lincoln Financial.

Founded in 1995, Summit Planning Group brings together a diverse group of advisors with backgrounds in accounting, finance, tax and investments who work together to address each client's sophisticated wealth management needs. With registered offices in Branford and Glastonbury, Conn., the team includes financial advisors Brian Onofrio, CPA, AIF®, C. David Koncz, Karl Zirolli, CFP®, AIF®, Jay Pinto, CFP®, Frank Navario, CLU, Alison G. Gaffney, MBA, CRPC®, and Ben Onofrio, MBA.

"We understand it takes a multi-faceted group to coordinate the distinct elements of a client's complex financial situation into one smoothly working, inter-related plan," Onofrio said. "As entrepreneurs and independent advisors, we take the time to provide customized plans and ongoing guidance for each client's financial situation. We pride ourselves on our ability to truly understand our clients and communicate complex ideas in a straightforward, simple format."

Their due diligence process and commitment to excellence led the Summit Planning team to LPL Financial, which they called "second to none" in terms of the service experience for both advisors and clients.

"LPL is a stable partner and Fortune 500 company that invests heavily in industry-leading capabilities and strategic business resources," Onofrio said. "We believe LPL puts our clients in a better suited position as they seek to maximize their returns and reduce risks, all while receiving a higher level of service. Ultimately, we believe that everything LPL offers will help us with the ease of doing business, freeing up more time to spend with clients."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Summit Planning Group to LPL and look forward to supporting the continued growth and evolution of their firm. Our sole focus is advisors, and we constantly look for ways to support them for the long run through investments in innovative capabilities and strategic business solutions designed to help advisors thrive and win in their market."

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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 institutions, and not the other way around. Today, LPL is a leader in the markets we serve, serving nearly 23,000 financial advisors, including advisors at approximately 1,100 institutions 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 institution 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 institutions, so they can take care of their clients.

**Value approximated based on asset and holding details provided to LPL from end of year, 2023.*

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