



LPL Financial Welcomes Rizza Financial Services

Jul 29, 2024

SAN DIEGO, July 29, 2024 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) (Nasdaq: LPLA) announced today that financial advisor Jerry Rizza has joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported having served approximately \$250 million in advisory, brokerage and retirement plan assets* and joins LPL from Osaic.

With 31 years of financial services experience, Rizza's unique background includes playing professional baseball within the Oakland A's minor league system followed by more than three years as an accountant at a CPA firm in New York City. "As I learned more about the financial services industry, I fell in love with the idea of helping families plan for a more secure financial future," said Rizza, who grew his business organically by word of mouth.

Based in Melville, NY, about 30 miles from New York City, Rizza is joined at Rizza Financial Services by two highly valued, longtime licensed assistants Rachel Beneventano and Jessica Weich. Rizza specializes in retirement planning and behavioral investment counseling, and he enjoys helping clients accrete wealth and harvest income for a more comfortable retirement.

The move to LPL was driven by Rizza's desire for enhanced service experiences, office efficiencies and a robust technology platform.

"LPL's advisor-centric model offers the support we need to serve our clients more efficiently and effectively," Rizza said. "My staff will appreciate the ease of doing business with LPL's integrated platform, and no doubt my clients will appreciate that they can log into one online portal to view all their account information. This move has been years in the making, and I believe it's a strategic investment in our future."

Scott Posner, LPL Executive Vice President, Business Development, said, "It is an honor to welcome Jerry, Rachel and Jessica to the LPL community. We are committed to delivering innovative technology and comprehensive business solutions to help advisors differentiate their practice and increase value to their clients. We look forward to supporting Rizza Financial Services 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 institutions, and not the other way around. Today, LPL is a leader in the markets we serve, serving more than 23,000 financial advisors, including advisors at approximately 1,000 institutions and at approximately 580 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.

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. Rizza Financial Services 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.*

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