



LPL Financial Welcomes Bury Financial Group

Sep 19, 2024

SAN DIEGO, Sept. 19, 2024 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#), announced today that the advisors with [Bury Financial Group](#) have joined LPL Financial's broker-dealer, RIA and custodial platforms. They reported having served approximately \$655 million in advisory, brokerage and retirement plan assets* and join LPL from Osaic.

President and Managing Partner Todd Bury founded the Youngstown, Ohio-based practice in 1992 while he was a sophomore in college. He earned his financial planning license by age 20 and steadily grew his client base, operating as a one-man shop for more than a decade. In 2006, Bury partnered with Vice President/ Managing Partner Brian Laraway, who shared his values and belief that clients are better served in a collaborative environment where each advisor brings a different skillset and background to the team.

Together they built a full-service wealth management firm focused on long-term planning. The team now includes fellow partners David Maxwell, Gregory Gett and Kelcie Schiraldi, as well as advisors Nicholas Romeo and Sarah Bury. They are supported by Vice President of Operations Kelly Frammartino, paraplanners Bill Nock and Alexander Baker, and client services team members Jocelyn Palowitz and Amanda Pepper.

"We have close relationships with each of our clients and treat them like family," Bury said. "It's our goal to help them lead happier, healthier and more productive lives. We believe our success is based on our long history of strong leadership, sound investments and innovative products and services."

Looking to elevate their practice and create differentiated service experiences for clients, Bury Financial Group turned to LPL.

"We are excited to join LPL Financial and partner with a firm that shares our commitment to providing clients with the highest level of service and advice," Laraway said. "LPL is dedicated to independence and providing ultimate flexibility with an open architecture platform that empowers advisors to provide a broad spectrum of investment products and services to clients. With this move, we have strengthened our team and brand to give clients the level of service they deserve and should expect."

Scott Posner, LPL Executive Vice President, Business Development, said, "It's an honor to welcome Bury Financial Group to LPL. As teams like Bury Financial seek more sophisticated resources to evolve their offerings and build their perfect practice, we continue to invest in a wide range of differentiated services and innovative capabilities to help them deliver great experiences to their clients. We wish Bury Financial Group much success in the next chapter of their business."

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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 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. Bury Financial Group 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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