LPL Financial

LPL Financial Welcomes Dougherty, Tedesco & Associates

Oct 24, 2024

SAN DIEGO, Oct. 24, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC, announced today that the financial advisors at Dougherty, Tedesco & Associates have joined LPL Financial's broker-dealer, RIA and custodial platforms. They reported serving approximately $800 million in advisory, brokerage and retirement plan assets,* and join LPL from Osaic.

Founded in the early 1980s by Charlotte Dougherty, CFP®, the business has evolved over the years to into a holistic wealth management firm and cornerstone of the greater Cincinnati area. Now under the leadership of advisors Andrew Tedesco, CFP®, and John Dougherty, III, MBA, CFP®, CRPC®, the firm offers a comprehensive range of wealth advisory services, including financial planning, investment management, retirement planning and estate planning. The team also includes Registered Sales Assistant John Dougherty, Jr., Director of Client Services Caitlin Ackerman and support staff members Rita Anno and Ben Verchick.

"Our mission is to lead clients to a more secure financial future, supporting them step by step through life's various stages," said John Dougherty, III, noting they primarily serve corporate executives, engineers and medical practitioners. "We take a team approach to providing customized strategies as we explore every avenue to help optimize the client's success. Throughout the financial planning process, we never lose sight of one essential element: personal service."

The transition to LPL Financial represents a calculated move for Dougherty, Tedesco & Associates, positioning the firm to deliver more customized solutions and elevated client services.

"We are excited to join LPL Financial and leverage its robust platform to provide clients with more holistic, tailored experiences," Tedesco said. "LPL's comprehensive platform, advanced technology and substantial resources will give us more flexibility to respond to the diverse needs of our client base. Additionally, LPL's size, strength and commitment to innovation align with our own values and aspirations for growth. We're confident in our ability to expand our business and fulfill our commitment to providing exceptional care to help clients navigate their financial journeys with confidence."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Dougherty, Tedesco & Associates to the LPL community and look forward to supporting the growth of their firm. LPL is committed to delivering robust resources, strategic business solutions and innovative capabilities that can help this team and all of our advisors differentiate their practice and be successful at every stage of their business' lifecycle."

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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.

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

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