LPL Financial Welcomes Strata Financial Group

Nov 20, 2024

SAN DIEGO, Nov. 20, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC, announced today that financial advisors Anthony "Tony" Campagni, CFP®, Ronald Jurczynski, CPA/PFS™, Mitchell Romeo, CPWA®, CPFA®, Kyle Hancharick, CFP®, and Dominic Elmo of Ohio-based Strata Financial Group have joined LPL Financial's broker-dealer, RIA and custodial platforms. The advisors reported serving more than $350 million in advisory, brokerage and retirement plan assets,* and they join LPL from Osaic.

Strata Financial Group was founded in 1998 by Campagni and the late Rino Romeo — Mitchell Romeo's uncle — and currently operates in two Ohio locations: Sheffield Village, where the team serves the greater Cleveland area, and Dublin, serving the Columbus area. The advisors take a team-based approach to offering personalized strategic financial plans, tax strategies, retirement preparation, investment planning and wealth preservation to clients across the nation. Strata is led by partners Campagni, Jurczynski and Mitchell Romeo and includes support staff members Emily Dohnenko and Shayla Svetgoff.

"Our team is dedicated to providing comprehensive financial services for busy professionals, executives, business owners and families who are looking for a partner to help them maximize their wealth," said Campagni. "With a unique focus on tax and financial planning in an ever-changing environment, we empower our clients to make well-informed decisions and create tailored plans that prioritize their financial goals."

Why the team chose LPL

To further their commitment to top-tier client service, Strata Financial Group turned to LPL Financial. By partnering with LPL, the team now has access to enhanced resources, operational support and advanced technologies to help clients pursue their financial goals.

"We were drawn to LPL because of its transparency and robust public presence," said Romeo. "LPL's commitment to service and technology is evident, and it's clear LPL prioritizes supporting advisors and their staff, so Strata Financial Group can have more time to focus on servicing our clients."

Jurczynski added, "Our goal is to leverage LPL's vast resources to provide the highest level of service to our clients, from consolidated reporting to being able to access a broader range of investment and insurance solutions. This will allow Strata Financial Group to continue to try to improve and create differentiated experiences for clients."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Tony, Ronald, Mitchell, Kyle and Dominic to LPL Financial. At LPL, we are steadfast in our commitment to supporting independent advisors. Our platform is designed to empower these professionals with industry-leading resources, innovative technology and dedicated services that enable advisors to serve their clients their way. We look forward to supporting Strata Financial Group 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 28,000 financial advisors, including advisors at more than 1,000 institutions and nearly 600 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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