



LPL Financial Welcomes Salient Wealth Planning Group

Jan 29, 2025

SAN DIEGO, Jan. 29, 2025 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisors John P. Schlatter, CFP®, Robert Rojano, Alec Hoag, CFP®, and Michael Madden, CFA®, have joined LPL Financial's broker-dealer, RIA and custodial platforms. They reported serving approximately \$1 billion in advisory, brokerage and retirement plan assets* and join LPL from Osaic.

Based in Manhattan Beach, Calif., Schlatter founded [Salient Wealth Planning](#) Group to provide clients with customized investment strategies, financial planning and wealth preservation services emphasizing tax efficiency and wealth transfer through multiple generations. The advisors take an interdisciplinary approach to help ensure all aspects of each client's financial situation are coordinated and reviewed.

"We take a holistic process to build on the foundations that clients have already laid, and we believe good planning helps the right choices reveal themselves," Schlatter said, noting they primarily work with high-net-worth clients. "Our services are rooted in developing deep personal relationships to help families navigate the challenges and opportunities of managing generational wealth."

The Salient team selected LPL for its advanced capabilities and commitment to providing exceptional customer service experiences.

"The foundation of our business is built on value-added consulting and meticulous planning," Schlatter said. "To perpetuate this legacy, we require a stable partner to meet this standard through superior customer service and technology. With LPL, we have a dedicated service team and access to a wide range of innovative capabilities, strategic business solutions and research."

Schlatter said he appreciates LPL's significant technology investment, including approximately [\\$500 million in 2024](#) for innovation and infrastructure enhancements. He said, "As a Fortune 500 company, LPL is a leading wealth management firm that puts our business and clients in a better position for a more successful future. Most of our clients have been with us for more than 20 years, and we are excited to continue enhancing their experiences over the next 20 years."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome John, Robert, Alec and Michael to the LPL community. We look forward to supporting their vision by providing elevated services and integrated technology to help them remain competitive in the evolving wealth management landscape. LPL's sophisticated wealth management platform and robust business tools are designed with advisors in mind, to help them run thriving practices and be successful in serving the needs of their clients."

Related

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About LPL Financial

LPL Financial Holdings Inc. (Nasdaq: LPLA) is among the fastest growing wealth management firms in the U.S. As a leader in the financial advisor-mediated marketplace, LPL supports more than 28,000 financial advisors and the wealth management practices of approximately 1,200 financial institutions, servicing and custodizing approximately \$1.8 trillion in brokerage and advisory assets on behalf of 6 million Americans. The firm provides a wide range of advisor affiliation models, investment solutions, fintech tools and practice management services, ensuring that advisors and institutions have the flexibility to choose the business model, services, and technology resources they need to run thriving businesses. For further information about LPL, please visit www.lpl.com.

Securities and advisory services offered through LPL Financial (LPL), a registered investment advisor and broker dealer, member FINRA/SIPC. LPL Financial and its affiliated companies provide financial services only from the United States. Salient Wealth Planning Group and LPL 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, 2024.*

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