LPL Financial

LPL Financial Welcomes Charter Oak Wealth Partners

Feb 3, 2025

SAN DIEGO, Feb. 03, 2025 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that the advisors at Charter Oak Wealth Partners have joined LPL Financial's broker-dealer, RIA and custodial platforms, aligned with existing firm Academy Financial. They reported serving approximately $600 million in advisory, brokerage and retirement plan assets* and join LPL from Osaic.

Based in Hartford County, Conn., Charter Oak Wealth Partners was founded in 2016 by Gary Paul, CRPC®, although the practice's roots date back more than 50 years. Paul is joined by fellow advisors Gary Salva, Bill Matzinger and Chris Scuderi, and they are supported by Client Relationship Manager Lori Tedone. Together, they provide comprehensive financial planning and investment services for individuals, families and businesses.

"We are committed to maintaining the highest standards of integrity and professionalism in our relationship with our clients," Paul said. "We endeavor to know and understand our clients' financial situations and provide them with only quality information, services and products to help them pursue their goals."

The team at Charter Oak Wealth Partners turned to LPL after extensive market research to enhance service capabilities and propel the next phase of its development. Like Academy Financial, which joined LPL in August, the Charter Oak team has stood by its longtime mission of, "Serve first, last and always."

"We're excited to tap into LPL's vast resources and services to provide our clients with elevated experiences," said Paul. "We chose LPL for its stability as a Fortune 500 company, along with its strategic support, innovative technology and shared focus on putting clients first. Add to that the additional resources and support from Academy, and we believe we are in a prime position to enhance our offering, grow the business and serve clients better than ever."

Academy Financial Partner Brent J. Kvech stated, "We're excited for the opportunity to work with the Charter Oak team and grow our firm together. This is a team that shares our values of putting clients first and foremost, and we found that to be a perfect alignment. We believe this relationship will strengthen our firm and add value to clients."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome the Charter Oak team to the LPL community and congratulate Academy Financial on its continued growth. We are committed to delivering robust resources, business solutions and innovative capabilities that help our advisors differentiate their practice and succeed at every stage of their business' lifecycle. We look forward to a long-lasting relationship with the entire team at Charter Oak Wealth Partners."

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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 29,000 financial advisors and the wealth management practices of 1,200 financial institutions, servicing and custodying approximately $1.7 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.

**Value approximated based on asset and holding details provided to LPL from end of year, 2024.*

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