LPL Welcomes Shorepoint Wealth Management

Mar 5, 2025

SAN DIEGO, March 05, 2025 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Justin Lotano, CDFA®, has joined LPL Financial's broker-dealer, Registered Investment Advisor (RIA) and custodial platforms. He reported serving approximately $250 million in advisory, brokerage and retirement assets* and joins LPL from Wells Fargo Advisors Financial Network.

Based in Colts Neck, N.J., Lotano's profound interest in investments and his dedication to helping others have been the cornerstones of his professional journey since he started his career in 2006. He is joined by Joe Burgard, a recent financial advisor, along with registered representative Kevyn Marteniz and staff members TJ Savona and Gianna Granato.

"We are a young team, with an average age of about 30, but we have a great level of experience guiding individuals into a more successful retirement," said Lotano, who noted the team also focuses on helping clients through divorce and other life transitions. "We've made it a priority to cultivate long-lasting relationships with clients, and now we're beginning to work with their children and grandchildren. Our goal is to help clients feel empowered and informed along each step of their financial journey, whether that's navigating major life transitions, managing their wealth or planning for retirement."

Lotano, president of the Colts Neck Lions Club, is highly active in his community. He is proud to launch Shorepoint Wealth Management in the city where he grew up.

"Working with LPL will allow me to build my brand and grow the business on my terms," Lotano said. "LPL is constantly investing in technology and operational support, making it the ideal place to run my business. I appreciate the integrated technology and optionality within LPL's platform, which allows us to evaluate the best planning software and other programs to pick the best fit for our clients and business. I'm excited for what's ahead for Shorepoint Wealth Management."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Justin and his team to the LPL community. At LPL, we are dedicated to empowering advisors with the essential tools and support to help them create value with clients and run thriving practices. Our platform offers the flexibility and support they require to develop their brand and expand their business on their own terms. We look forward to supporting Shorepoint Wealth Management for generations to come."

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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 nearly 29,000 financial advisors and the wealth management practices of approximately 1,200 financial institutions, servicing and custodying approximately $1.7 trillion in brokerage and advisory assets on behalf of approximately 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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