LPL Financial

LPL Welcomes Synergy Wealth Strategies

Apr 23, 2025

SAN DIEGO, April 23, 2025 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor James “Jim” Verdi, CFP®, has joined LPL Financial’s broker-dealer, Registered Investment Advisor (RIA) and custodial platforms. He reported serving approximately $350 million in advisory, brokerage and retirement plan assets* and joins LPL from Osaic.

Based in Smithtown, N.Y., Verdi founded Synergy Wealth Strategies in 2008, driven by the mission that investors deserve a reputable, stable and safe place to house their investments. The firm’s name comes from the definition of synergy: the combined power of a group of things when they are working together that is greater than the total power achieved by each working separately. Together with his team, Verdi takes a comprehensive and holistic approach to wealth management to help clients create a more confident financial future for themselves and their families.

“Our clients’ goals are well thought out and often quite complex. Their portfolios should reflect the same,” Verdi said. “We do not believe in ‘cookie-cutter’ solutions to complex issues. Instead, our investment advisory team spends the time to carefully consider the intricate issues of each individual and utilize the products and services that best suit the specific needs of each client.”

Looking to enhance their client experience, improve their technological capabilities and grow their business, the Synergy Wealth Strategies team turned to LPL Financial.

“By partnering with LPL, we can provide large-firm asset management with boutique-firm planning and strategy,” Verdi said. “With LPL’s integrated technology platform, we can access everything we need with a single sign-on, and by using their back-office support, we will be able to spend more time with our clients — where we belong.”

Scott Posner, LPL Executive Vice President, Business Development, said, “We welcome Jim and his team to the LPL community and wish them success with this next chapter of their business. Like Jim, we understand that the whole is greater than the sum of its parts. To that end, LPL is committed to investing in industry-leading capabilities and strategic resources to help advisors thrive both operationally and strategically. We look forward to supporting Synergy Wealth Strategies for years 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.

Securities and advisory services offered through LPL Financial LLC (“LPL Financial”), a registered investment advisor and broker-dealer, member FINRA/SIPC. Synergy Wealth Strategies and LPL Financial 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 as reported to LPL*

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