



LPL Financial Welcomes Northern Advisory Group

May 5, 2025

SAN DIEGO, May 05, 2025 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that 10 financial advisors with [Northern Advisory Group](#) have joined LPL Financial's broker-dealer, Registered Investment Advisor (RIA) and custodial platforms. They reported serving approximately \$300 million in advisory, brokerage and retirement plan assets* and join LPL from Osaic.

Partners Richard DiTaranto, Brian DiBrino and Jeff Miller, who have a combined eight decades of wealth management experience, teamed up in 2004 to launch Northern Advisory Group. The ensemble practice is headquartered in Fairfield, N.J., and includes fellow financial advisors Anthony Fresella, Daniel Greenwood, Griffin Durand, Robert Kelley, Seamus Nelson, Jaret Mittenthal and Damien DiTaranto — Richard's son. Together, the group takes a holistic approach to helping their clients work towards their fiscal goals.

"We really take the time to understand our clients' fiscal goals — both in the short and long-term — by asking where they would like to be in 10-, 15-, 20-years," DiBrino said. "Using that information, we put together a customized plan, get our clients' buy-in and then work with them to make adjustments over the years to help them pursue their financial goals."

"Client education is key because we want our clients to understand the process and take an active role in their financial futures," DiTaranto said. "We want them to ask questions and take a vested interest in how their money is invested. After all, the best client is an educated client."

Looking for enhanced service experiences and a more robust technology platform, the Northern Advisory team made the move to LPL after an in-depth due diligence process.

"It was the campus visit that sealed the deal for me," DiBrino said. "We had only been there for about 15 minutes when I said, 'This is the spot for us.' I was impressed by several things during that visit, such as how it was made clear that we are the client and LPL is here to serve us. I also appreciated learning that 90% of calls are picked up by a real person within 30 seconds and most issues are resolved during that first call. I am confident that partnering with LPL is the right choice for the next phase of our business."

DiTaranto added, "With LPL's technology platform, our clients are going to appreciate the single sign-on, and the service LPL provides is second to none. By moving to LPL, not only will we be better able to serve our clients today, but we can grow our business into something generational — allowing Northern Advisory Group to serve clients for years to come."

Scott Posner, LPL Managing Director, Business Development, said, "We welcome the team at Northern Advisory Group and congratulate them on this milestone in the evolution of their practice. As a leading wealth management firm, LPL is committed to delivering innovative technology and comprehensive business solutions to help advisors differentiate their practices and increase value for their clients. We look forward to supporting Northern Advisory Group in this next chapter of their business."

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 nearly 29,000 financial advisors and the wealth management practices of approximately 1,200 financial institutions, servicing and custodialing 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.

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. Northern Advisory Group and LPL Financial are separate entities.

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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