



LPL Financial Welcomes Zarra Wealth Management

Aug 19, 2025

SAN DIEGO, Aug. 19, 2025 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that the advisors of [Zarra Wealth Management](#) have joined LPL Financial's broker-dealer, Registered Investment Advisor (RIA) platform. They reported serving approximately \$270 million in advisory, brokerage and retirement plan assets* and join LPL from Ameriprise.

Based on Long Island, in Westbury, NY, the team consists of Christopher Zarra, CFP®, CHFC®, CFS®, James Kelly CFP®, APMA™ and Michele Welch, CFP®. They bring 48 years of collective financial industry experience focusing on families, pre-retiree and retiree clients. The team in particular prides itself on achieving the rigorous CFP® designation and providing the utmost in fiduciary guidance to their clients.

"We're often introduced to our clients' family members because of the high-touch, personalized service we provide," said Welch. "We all share the same philosophy: we treat our clients like family, anticipate their needs, and prepare them for any financial situation. Acting in their best interest is always our top priority."

Why Zarra Wealth Management Chose LPL

In search of greater autonomy while maintaining a client-first focus, the team spent years conducting thorough due diligence before choosing LPL.

"This was a thoughtful decision to get away from the franchise model and gain more freedom and independence," said Zarra. "As three CFP® professionals, it was important for us to align with a firm that offers no proprietary investment products and provides us the flexibility to run our practice in a way that best serves our clients. With LPL, we now have access to a broader range of products, tools, technology, and support to elevate our practice and help clients."

Kelly added, "We don't believe in a cookie-cutter approach. Every client's financial plan and investment portfolio is thoughtfully customized to their needs. We are excited to have the flexibility to tailor strategies for our clients without being limited by a corporate agenda."

Scott Posner, Managing Director, Business Development, said, "We welcome the Zarra Wealth Management team to LPL. At LPL, we recognize that advisors are looking for sophisticated capabilities and autonomy to build and grow their ideal practice according to their vision. We look forward to supporting the team 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 over 29,000 financial advisors and the wealth management practices of approximately 1,100 financial institutions, servicing and custodizing approximately \$1.9 trillion in brokerage and advisory assets on behalf of approximately 7 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. Zarra Wealth Management 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 based on asset and holding details provided to LPL from end of year, 2024.*

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