Q4 Company

NEWS RELEASE

LPL Financial Welcomes GreenPoint Wealth Management

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SAN DIEGO, Sept. 26, 2024 (GLOBE NEWSWIRE) -- **LPL Financial LLC**, announced today that financial advisors Jeff Minucci, CFP®, and David Ryzman, CFP®, have joined LPL Financial’s broker-dealer, RIA and custodial platforms. They reported having served approximately $150 million in advisory, brokerage and retirement plan assets* and join LPL from Osaic.

For more than 20 years, Minucci and Ryzman have collaborated in various roles within the financial services industry, eventually becoming business partners in the independent space. They specialize in developing innovative strategies to help meet their clients’ retirement planning objectives and use robust financial education to encourage their clients to better understand their financial portfolios.

“We believe in a comprehensive approach, which includes designing plans tailored to each individual client to help reduce risk and tax implications, while focusing on long-term performance, sustainable retirement income and effective estate protection,” Minucci said.

With the move to LPL, the McKinney, Texas-based advisors have launched a new firm, GreenPoint Wealth Management.

“We wanted to create our own identity and shape our practice on our terms,” Ryzman said. “After a thorough due diligence process, we felt LPL was the ideal landing spot to support our continued growth. We appreciate LPL's strong reputation as a leading wealth management firm. We’ve also found that LPL has streamlined processes that make it much easier to do business, which then gives us more time to spend taking care of our clients.”

Scott Posner, LPL Executive Vice President, Business Development, said, “We extend a warm welcome to Jeff and David and congratulate them on the launch of GreenPoint Wealth Management. Through integrated capabilities and comprehensive business management solutions, LPL is driving flexibility and efficiency, enabling independent financial advisors to focus on growth, entrepreneurialism and putting their clients first.”

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About LPL Financial

LPL Financial Holdings Inc. (Nasdaq: LPLA) was founded on the principle that LPL should work for advisors and institutions, and not the other way around. Today, LPL is a leader in the markets we serve, serving more than 23,000 financial advisors, including advisors at approximately 1,000 institutions and at approximately 580 registered investment advisor firms nationwide. We are steadfast in our commitment to the advisor-mediated model and the belief that Americans deserve access to personalized guidance from a financial professional. At LPL, independence means that advisors and institution leaders have the freedom they deserve to choose the business model, services and technology resources that allow them to run a thriving business. They have the flexibility to do business their way. And they have the freedom to manage their client relationships, because they know their clients best. Simply put, we take care of our advisors and institutions, so they can take care of their clients.

Securities and Advisory services offered through LPL Financial LLC ("LPL Financial"), a registered investment advisor. Member FINRA/SIPC. LPL Financial and its affiliated companies provide financial services only from the United States. GreenPoint 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, 2023.

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