

LPL Financial Recruits \$1 Billion Team from Securian

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LPL Financial LLC, the nation's largest independent broker-dealer, has added San Mateo, California-based SGC Financial and Insurance Services to its broker-dealer and corporate registered investment advisor platforms. The group of 13 financial advisors join LPL from Securian Financial and serve more than \$1 billion in advisory, brokerage and retirement plan assets.

SGC Financial's roots date back to 1945 when the firm launched as a general agency for an insurance company. Over the years, the firm morphed into a large enterprise of financial advisors who focus on providing comprehensive wealth management and financial planning services.

The leadership team is comprised of Cara Banchemo, chief operations officer, and financial advisor Matthew Bond, who has served as firm president since 2011. They are joined by financial advisors Robert Ostenberg, Peter Evans,



Joseph Winslow, Jason Heise, Anthony DiRegolo, Justin Skelton, Aaron Moore, Steve Grochol, Chris Manzi, Patrick McAndrew, Kevin Lyle and Ed Bruzzone, as well as several office support staff members.

LPL Financial provides service to approximately \$762 billion in brokerage and advisory assets as of June 30, 2020. The company provides proprietary technology, clearing services, practice management programs and training, and independent research to 16,973 financial advisors.

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