LPL Financial Welcomes Conte Wealth Advisors, LLC

Aug 24, 2026

SAN DIEGO, Aug. 24, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that the Conte Wealth Advisors, LLC (CWA) team has joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. The firm reported serving approximately $1.6 billion in advisory, brokerage and retirement plan assets* and joins LPL from Cambridge Investment Research.

Headquartered outside of Harrisburg, Pa. in Camp Hill, Conte Wealth Advisors, LLC is a third-generation family-owned firm led by financial advisor Tony Conte, CFP®, CEPA®. The practice traces its roots back to Tony's grandfather, Sam Conte, who entered the financial services industry in the 1950s. Tony's father, Frank Conte, CLU®, ChFC®, later joined the business and continues to serve clients today. Tony’s brother-in-law, Joe Henriques, CFP®, AIF®, is also part of the practice as managing director, principal wealth advisor. Since assuming leadership of the firm in 2012, Tony has overseen the growth of CWA into a collaborative enterprise supporting 24 advisors and offices across multiple states.

CWA serves business owners, high-net-worth and ultra-high-net-worth individuals and families through a planning-first approach designed to address clients' investments, businesses and broader financial lives.

"We treat every client relationship as though they deserve the experience of a Family Focused Office," Conte said. "Our role is to help guide clients toward not only suitable investment strategies, but also suitable financial decisions for themselves, their businesses and often their employees. It's a comprehensive approach built on long-term relationships and thoughtful planning."

The firm differentiates itself through its collaborative culture, bringing together independent-minded advisors who regularly share ideas, best practices and expertise to better serve clients. The team meets weekly to discuss client strategies and support one another's growth.

"We've built a culture where advisors can maintain their independence without feeling like they're on an island," Conte said. "Our advisors genuinely support one another and openly share insights and experiences. That collaboration makes us better advisors and enables us to deliver more effective planning and investment guidance to our clients."

Why Conte Wealth Advisors Chose LPL

As the firm continues to expand, recruiting and supporting growth-oriented advisors remains a strategic priority. CWA selected LPL for its technology capabilities, advisor support resources and ability to help the firm scale while enhancing the client experience.

"We want to continue attracting advisors who fit our culture and helping them build successful businesses," Conte said. "LPL gives us the scale, technology and resources necessary to do that. Just as importantly, it provides stability and forward-looking investment in innovation that we believe is essential to serving clients and growing our business well into the future."

Conte added that the firm's due diligence process reinforced confidence in the move.

"The level of support we've received throughout this transition has been remarkable," he said. "What stood out most was the culture. From the beginning, we've felt a genuine commitment from LPL's leadership and teams to helping us succeed, and that gave us confidence we were making the right decision for our advisors and clients."

LPL Chief Growth Officer Marc Cohen said, “In getting to know Tony, I came to appreciate his genuine care for CWA’s clients and advisors, as well as his thoughtful stewardship of the Conte family legacy. His passion for serving others and the collaborative culture he and his team have built strongly resonate with our values at LPL. We are honored that Tony, Frank, Joe, and the entire Conte Wealth Advisors team have chosen LPL, and we look forward to helping them pursue their vision while preserving what makes the firm so distinctive.”

Beyond its wealth management business, CWA is actively involved in its local communities and is exploring the creation of a charitable foundation that would empower clients to help direct annual philanthropic giving to organizations making a meaningful impact.

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About LPL Financial

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Securities and advisory services offered through LPL Financial LLC ("LPL Financial"), a registered investment advisor and broker-dealer, member FINRA/SIPC. Conte Wealth Advisors 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, 2025.*

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