EXECUTIVE PROFILE

PRIVATE CLIENT

LPL Financial

JOHN PODESTO, AIF®

ASSOCIATE CONSULTANT

As an Associate Consultant with the LPL Private Client Consulting team, John partners with Financial Advisors to help them win and retain high net worth clients by developing customized solutions for their unique investment and planning needs. Whether their client opportunities are individuals, families, or institutions, John supports advisors by helping them develop and present potential strategies, as well as provide ongoing support through practice management guidance and performance reporting capabilities.

Prior to joining the Private Client Consulting team in February of 2015, John was a Senior Platform Manager with LPL's Investment Platform Solutions, in charge of developing and marketing LPL's open architecture advisory platforms. Prior to that, John spent 4 years cultivating his industry knowledge and consulting skills as an Investment Product Specialist and as an Internal Advisory Consultant. John holds various industry credentials, including;

– Accredited Investment Fiduciary (AIF®) designation,
– FINRA Series 7 and 66 Licenses,

John is currently pursuing the CERTIFIED FINANCIAL PLANNER™ Practitioner (CFP®) designation. Additionally, John earned a BS in Finance from the College of Business at San Diego State University, where he actively participated in their student Finance & Investment Society program.