Sergio A. Mariaca
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By way of background, I received a B.S. Degree in Economics and Financial Management from the University of North Carolina – Asheville. I am a Registered Securities Principal, a Registered Investment Advisor Representative and a Branch Manager with LPL Financial. My professional credentials include membership in the Financial Planning Association (FPA), the Investment Management Consultants Association (IMCA), and the National Association of Insurance and Financial Advisors (NAIFA). During the course of my professional career, I have been interviewed and or cited by Good Morning America, The LA Times, the Women's Financial Network and other news organizations.

I believe in giving back to my community and serve on the governing boards of the following non-profit organizations: The United Way of Palm Beach County, member of the Board of Directors since 2001, Chairman of the Board of Directors (2006 - 2008), Campaign Chairman (2004 - 2005). The Education Foundation of Palm Beach County, member of the Board of Directors since 2002, Chairman of the Board (2005 – 2006). The Area Agency on Aging of the Palm Beaches and Treasure Coast, member of the Board of Directors since 2003, 1st Vice President (2006 – present). SunFest, member of the Board of Directors (2007 – 2008). Girl Scouts of America, Co-Chair for the South Florida Executive Realignment 2007 – 2008).

As a LPL Financial Advisor, I believe that my strongest assets are the relationships I establish with my clients. Drawing on my experience and knowledge, I provide clients with appropriate investment guidance and personalized service.

I am committed to working closely with my clients to develop an investment plan tailored to their particular needs. The plan includes a thorough understanding of objectives, realistic expectations, and an understanding of the risks and rewards inherent in all investment vehicles selected.

I work with **businesses, non-profits** and **management teams** to review and establish:

- Retirement Plans
- Lending Services
- Key Man Insurance
- Cash Management Programs
- Succession Planning
- Fiduciary Trust Services

I work with **individuals** and **families** in developing and implementing:

- Investment & Wealth Plans
- Education Savings Plans
- 401K / 403B / 457 Rollovers
- Retirement Strategies
- Tax Advantaged Investment Strategies
- Disability / Life / Long Term Care Insurance

I look forward to serving your financial needs. At your convenience, kindly contact me to arrange a consultation.

Offices located in Boca Raton * Boynton Beach * Lake Worth * West Palm Beach