LPL Financial

LPL Financial Welcomes Bradford Capital Group

Oct 5, 2023

CHARLOTTE, N.C., Oct. 05, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors and partners Chris Bradford, CFP®, Dave Meagher and Stina Bradford have joined LPL Financial's broker-dealer, RIA and custodial platforms. The team reported having served approximately $150 million in advisory, brokerage and retirement plan assets*, and joins LPL from Securities America, part of Osaic (formerly Advisor Group).

Based in Sacramento, Calif., Bradford Capital Group (BCG) was founded by Managing Partner Chris Bradford, who transitioned from a career as a fulltime college football coach at UC Davis to the financial services industry in 2002. Meagher teamed up with Bradford earlier this year, having built and exited several software companies prior to shifting to his career as an advisor. To support the continued growth at BCG, Stina Bradford joined the business in 2017 as Operations Manager.

"We are a dedicated team of qualified financial professionals whose main focus is to act in our clients' best interests," Chris Bradford said. "We provide holistic wealth analysis and financial planning, and we consider ourselves a partner to our clients as they build wealth and work toward their financial goals. At Bradford Capital Group, we never stop coaching and educating our clients to help them navigate the ever changing economy, marketplace and tax laws."

As the industry evolves, the Bradford team decided to shift their focus to helping business owners with exit strategies and providing private wealth management services to high-net-worth families. With the shift in business, the team turned to LPL.

"By moving to LPL, we have access to an exclusive set of sophisticated services in the high-net-worth space that will enable us to offer exceptional service to clients as they build wealth and transfer it to the next generation," Meagher said. "We appreciate that LPL gives us more flexibility and HNW options such as trust planning and concentrated wealth management, along with access to a team of specialists who support the complex issues of estate planning for HNW families."

Scott Posner, LPL Executive Vice President, Business Development, stated, "We welcome Chris, Dave and Stina to LPL and are honored they recognized our commitment to helping advisors build their ideal practice on their own terms. We do this by providing sophisticated high-net-worth resources, innovative digital capabilities and robust business solutions designed to help them thrive. We look forward to supporting Bradford Capital Group for years to come."

Related

Advisors, find an LPL business development representative near you.

About LPL Financial
LPL Financial Holdings Inc. (Nasdaq: LPLA) was founded on the principle that LPL should work for advisors and enterprises, and not the other way around. Today, LPL is a leader in the markets we serve, serving nearly 22,000 financial advisors, including advisors at approximately 1,100 enterprises and at approximately 550 registered investment advisor ("RIA") 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 enterprise 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 enterprises, so they can take care of their clients.

**Value approximated based on asset and holding details provided to LPL from year-end 2022.*

Connect with Us!

https://twitter.com/lpl

https://www.linkedin.com/company/lpl-financial

https://www.facebook.com/LPLFinancialLLC https://www.youtube.com/user/lplfinancialllc

Media Contact:
Media.relations@LPLFinancial.com
(704) 996-1840

Tracking #486580