LPL Financial Welcomes Noble Traditions Wealth

May 13, 2024

SAN DIEGO, May 13, 2024 (GLOBE NEWSWIRE) -- [LPL Financial LLC] announced today that financial advisor Garrett Oczachowski has joined LPL Financial’s broker-dealer, RIA and custodial platforms. He reported serving approximately $280 million in advisory, brokerage and retirement plan assets* and joins LPL from JPMorgan Chase.

Based in Santa Monica, Calif., Oczachowski is a 25-year veteran of the financial services industry. Specializing in retirement income planning, he is dedicated to helping clients create sustainable income streams and navigate the complexities of retirement. He also provides support in investment management, risk management and estate planning.

The move to LPL marks the inception of Noble Traditions Wealth, a moniker chosen to embody fiduciary standards and his mission to create a client-centric practice. “My commitment is to forge robust, enduring connections with those I serve, delivering tailored investment strategies and retirement plans that align with their distinct aspirations and requirements,” he said.

His transition to LPL Financial was motivated by the pursuit of autonomy and the opportunity to conduct business on his terms.

“I am delighted to be affiliating with LPL Financial,” said Oczachowski. “The firm's dedication to independence and its client-focused philosophy are in perfect harmony with my own principles. This move will enable me to enhance the services I offer my clients, create efficiencies in my office and build a practice where the product isn’t the focus — the relationships are.”

Oczachowski was especially drawn to LPL’s integrated technology and flexibility to curate programs that are the best fit for his business. He added, “Independence is akin to a blank canvas, and LPL equips us with the finest 'paint colors' from across the globe. It allows us to do business with ease, thereby empowering us to direct our focus on client needs.”

Scott Posner, LPL Executive Vice President, Business Development, said, “We’re pleased to welcome Garrett to the LPL community. His desire to put his clients’ interests first and his focus on building strong personal relationships align perfectly with our firm’s culture. At LPL, we constantly strive to innovate our technology and solutions to help our advisors differentiate their practice and enhance their clients’ lives. We look forward to supporting Noble Traditions Wealth for years to come.”

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**Value approximated based on asset and holding details provided to LPL from end of year, 2023.*

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