LPL Financial

LPL Welcomes Lewellyn Wealth

Jan 8, 2025

SAN DIEGO, Jan. 08, 2025 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that father and son financial advisors Bart Lewellyn and Alex Lewellyn have joined LPL Financial's broker-dealer, RIA and custodial platforms. They reported serving approximately $320 million in advisory, brokerage and retirement plan assets* and join LPL from Osaic.

Based in Medford, Ore., Bart established the firm in 1995 to help clients accumulate wealth and invest their assets in a goal-oriented manner. Alex joined the firm in 2012 — something he had been planning since his youth. Together, they provide investment services, retirement planning, insurance strategies and complex planning services to a broad range of clients, including lineman engineers, business owners and multigenerational families.

"Our investment approach is methodical and purposeful," Alex explained. "Our goal is to provide our clients with a comprehensive understanding of the investment options available to them, focusing on those with the greatest potential for success. We prioritize what's most important to them, which in turn allows clients to spend more time living their life and doing what they enjoy."

Looking for a new wealth management firm, the Lewellyn's embarked on an extensive due diligence process that led them to LPL.

"We always wanted our name on the door, discretion, independence and the ability to operate in our clients' best interests," Alex said. "LPL's standing as a leading wealth management firm ensures that we have all of that, as well as access to innovative technology, support and flexible solutions. We are confident that this transition will enable us to maintain our commitment to the highest level of service for our clients."

With the transition to LPL, the team rebranded its practice from Lewellyn Financial Management to Lewellyn Wealth. Their refreshed logo features a stag, representing growth and protection, which Alex says, "reflects how we view ourselves as protectors of our clients' wealth."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Bart and Alex to LPL and look forward to supporting the growth and success of their practice. LPL is a champion for advisors, and our vision is to be the best firm to help our clients define and maximize their success throughout the entire lifecycle of their businesses. We do this by delivering personalized support, integrated capabilities and a flexible operating environment to help advisors expand their value proposition and build stronger connections with clients."

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About LPL Financial

LPL Financial Holdings Inc. (Nasdaq: LPLA) is among the fastest growing wealth management firms in the U.S. As a leader in the financial advisor-mediated marketplace, LPL supports more than 28,000 financial advisors and the wealth management practices of approximately 1,200 financial institutions, servicing and custodying approximately $1.8 trillion in brokerage and advisory assets on behalf of 6 million Americans. The firm provides a wide range of advisor affiliation models, investment solutions, fintech tools and practice management services, ensuring that advisors and institutions have the flexibility to choose the business model, services, and technology resources they need to run thriving businesses. For further information about LPL, please visit www.lpl.com.

**Value approximated based on asset and holding details provided to LPL from end of year, 2024.*

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