LPL Financial Welcomes Four Advisors to Carnegie Private Wealth

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SAN DIEGO, March 12, 2025 (GLOBE NEWSWIRE) -- [LPL Financial LLC] announced today that financial advisors James Larsen, CFP®, Lucas Decker, CFP®, Kevin Lewis, CFP®, CEPA®, and Seth Miller, CFP®, CEPA®, have joined LPL Financial's broker-dealer, Registered Investment Advisor (RIA) and custodial platforms, aligned with [Carnegie Private Wealth], an existing firm supported by [LPL Strategic Wealth]. The advisors reported serving approximately $475 million in advisory, brokerage and retirement assets.* Larsen joins LPL from Wells Fargo Advisors, and Decker, Lewis and Miller join from Edward Jones.

Carnegie Private Wealth [launched in 2023] with LPL Strategic Wealth and has been on an upward growth trajectory ever since. They leveraged LPL's business strategists, marketing resources and a dedicated CFO partner to help bring on like-minded advisors, which they found in Larsen, Decker, Lewis and Miller — all family-oriented advisors who share a deep commitment to going above and beyond for clients.

Meet James Larsen
Larsen spent 18 years in international business management prior to becoming an advisor in 2001. His objective is to provide a sense of serenity while helping clients manage and preserve their wealth. He chose to join LPL and Carnegie to help ensure business continuity.

"I've known many of the professionals at Carnegie Private Wealth for years and have always respected their expertise, client-first approach and values," Larsen said. "Joining this team allows me to collaborate with advisors who share my commitment to creating meaningful financial strategies for clients. Their advanced planning resources and genuine focus on building generational relationships puts me in position to enhance my client's lives moving forward."

Meet Lucas Decker
After a successful decade as a financial advisor, Decker has built a practice around providing clear, strategic financial solutions for business owners, corporate executives and pre-retirees. His approach as a CFP® combines formal education with real-world experience, helping ensure clients receive practical, well-informed guidance at every stage of life.

"Carnegie Private Wealth offers what I've been searching for; advanced planning resources, collaborative expertise, and innovative technology that allows me to create customized solutions for my clients," Decker said. "Their independent approach with support from LPL means I can focus on building lasting relationships and delivering personalized strategies that evolve with my client's needs."

Meet Kevin Lewis
Lewis has been a financial advisor for 10 years. He takes great pride in understanding his clients' unique stories, passions and goals, working primarily with business owners, sales executives, young professionals, families and individuals preparing for retirement.

Lewis said, "I chose to join Carnegie Private Wealth because of its robust resources, collaborative team and commitment to exceptional client service. With the additional support from LPL, this transition enables me to adopt a team-based approach and deliver more comprehensive, strategic financial planning for my clients."

Meet Seth Miller
Miller, who started working in financial services in college, became an advisor in 2011. His primary focus is helping successful young professionals and business owners with wealth preservation and intergenerational wealth planning. He said the move to Carnegie Private Wealth and LPL became an "obvious choice" after his due diligence process.

"The team approach allows for comprehensive expertise from tax planning to investment research," Miller said. "By going independent with Carnegie Private Wealth and LPL, I have more freedom to make decisions at a local level that are truly in my clients' best interests. Additionally, what sets the Carnegie Private Wealth team apart is their dedication to wealth management and exceptional client service above all else."

Carnegie Private Wealth's rapid growth is validation of their model and culture, which centers on exceptional client service, professional excellence and making a meaningful impact in their community.

Jordan Raniszeski, Senior Managing Partner and Founder of Carnegie Private Wealth, welcomed the advisors to Carnegie. He said, "This strategic expansion reflects our commitment to serving clients with excellence and expertise. Each of these professionals brings specialized skills and a shared understanding that success in wealth management comes from putting clients first. Their proven experience allows us to guide more families toward their aspirations while preserving the personal connections they've come to trust."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome James, Lucas, Kevin and Seth to the

LPL community and congratulate Carnegie on strategically growing its team of client-centric advisors. We are committed to supporting them with innovative technology, differentiated business solutions and robust wealth management platforms designed to create enhanced client experiences and help advisors thrive. We look forward to a long and successful relationship with the entire Carnegie team."

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About LPL Financial

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

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