LPL Financial Welcomes PCC Wealth Partners

May 20, 2025

SAN DIEGO, May 20, 2025 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Duane Dollar, CFP®, ChFC®, CASL®, and Phillip Owens, MBA, CFP®, CRPC ™, RICP®, APMA ™, have joined LPL Financial's broker-dealer, Registered Investment Advisor (RIA) and custodial platforms to launch PCC Wealth Partners. The team reported serving approximately $315 million in advisory, brokerage and retirement plan assets* and joins LPL from Ameriprise.

Based just outside of Houston in The Woodlands, Dollar and Owens have built a reputation for delivering customized investment strategies and an elevated client experience since teaming up in 2016. With nearly 50 years of combined industry experience, the pair take a holistic approach to helping their clients — most of whom are nearing or in retirement — plan for the next phase o their fiscal futures. The firm's name is an acronym for "principles, care and comprehensive approach," which the team uses as a guidepost to provide a truly integrated experience for their clients.

"When meeting with new clients, we are usually asked the same question: 'Do we have enough to do what we want in life?' As financial advisors, our job is to help answer that question," Dollar said. "We do that by taking the time to really understand our clients' unique goals. We also provide them with a financial education so they can take an active role in the process of putting together a tailored plan."

Looking for more freedom, flexibility and a new partner to help them grow their practice, Dollar and Owens turned to LPL Financial.

"We have found LPL to be the most professional and upright firm in this business, and our transition team is incredible. I have never felt more equipped to join any firm than I am right now," Dollar said. "When I turned 40, I asked myself where I wanted to be when I turned 50, and I knew the answer included ownership, autonomy and flexibility. Making this move to LPL was the right choice for our business and our clients."

Owens added, "This industry is changing faster than ever before, and I see this move to LPL as my greatest opportunity to regain my independence and to get back to the reasons I got into the financial industry in the first place — entrepreneurship and the ability to help my clients safeguard their fiscal futures."

Scott Posner, LPL Managing Director, Business Development, said, "We welcome Duane and Phillip and congratulate them on the move to independence. With more freedom and flexibility, financial advisors who choose LPL can work more effectively, run thriving practices and create value for their clients. We look forward to supporting PCC Wealth Partners for years to come."

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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 over 29,000 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 approximately 7 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.

Securities and advisory services offered through LPL Financial LLC ("LPL Financial"), a registered investment advisor and broker-dealer, member FINRA/SIPC. PCC Wealth Partners and LPL Financial are separate entities.

Throughout this communication, the terms "financial advisors" and "advisors" are used to refer to registered representatives and/or investment advisor representatives affiliated with LPL Financial.

We routinely disclose information that may be important to shareholders in the "Investor Relations" or " Press Releases" section of our website.

Value approximated as reported to LPL

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