



LPL Financial and Momentum Wealth Partners Welcome Beacon Financial

May 22, 2025

SAN DIEGO, May 22, 2025 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that [Beacon Financial](#) has joined LPL Financial's broker-dealer, Registered Investment Advisor (RIA) and custodial platforms, aligning with [Momentum Wealth Partners](#), an existing firm supporting LPL-affiliated advisors. The Beacon Financial team of 10 advisors reported having served approximately \$850 million in advisory, brokerage and retirement plan assets* and joins LPL from Cetera.

Based in Toledo, Ohio, Beacon Financial is led by Principal Owner and CEO Greg Kopan, AIF®, a seasoned financial services veteran with nearly two decades of industry experience. Kopan founded Beacon Financial in 1997 with the goal of helping clients build a more secure financial future. Today, Beacon Financial is a multi-generational practice leveraging multiple perspectives to work toward predictability for their clients' wealth horizon.

"Our clients range from business owners and professionals to those nearing or in retirement, and we take a comprehensive approach to understanding each of their needs and goals to create a personalized and tailored plan to help them meet their short- and long-term goals," Kopan said.

Looking to pair their client-centered philosophy with the desire to provide their clients with an elevated experience, the team spent 10 months researching firms and doing their due diligence before selecting LPL and Momentum as the best partners for their business goals.

"LPL stood out to us for several reasons," Kopan said. "First, LPL has a [strategic succession planning](#) team, and that's incredibly important as we are a multi-generational practice, and the future of the firm is always top of mind. LPL's robust [integrated and streamlined technology](#) also stood out because we have a lot of older clients, and I am confident that having a single sign-on will be a positive change for them. Another deciding factor is that LPL understands our concerns around cybersecurity and is committed to helping combat the issue. Last year, LPL spent more than \$500 million on [technology infrastructure and cybersecurity](#) to help advisors keep their businesses — and their clients — safe."

Kevin Frank, Momentum Wealth Partners Managing Partner and Co-founder, stated, "At Momentum, our mission is to empower advisors to achieve their professional goals by providing strategic planning, personalized support and an unwavering partnership — the same type of partnership that the Beacon Financial team provides to their clients. We look forward to a successful partnership for years to come."

Scott Posner, Managing Director, Business Development, said, "We welcome the Beacon Financial team and are honored they turned to LPL and Momentum Wealth Partners for the next phase of their business. At LPL, we are committed to helping advisors provide differentiated experiences by delivering innovative capabilities and strategic resources that make it easier for advisors to manage their practices and build long-term value with their clients."

Related

Advisors, learn how LPL Financial can help [take your business to the next level](#).

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 nearly 29,000 financial advisors and the wealth management practices of approximately 1,200 financial institutions, servicing and custodialing 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. Beacon Financial, Momentum 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 based on asset and holding details provided to LPL from end of year, 2024.*

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