



## LPL Financial Welcomes Beamish Wealth Management to Linsco Channel

May 27, 2025

SAN DIEGO, May 27, 2025 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisor Colin Beamish, CFP®, has joined LPL's employee advisor channel, [Linsco by LPL Financial](#), to launch [Beamish Wealth Management of LPL Financial](#). He reported serving approximately \$445 million in advisory, brokerage and retirement plan assets\* and joins LPL from City National Securities, Inc., a subsidiary of RBC.

Based in San Diego, Beamish transitioned to financial services in 2006 from the sports industry where he worked for the National Hockey League team Florida Panthers and the Arena Football League's Los Angeles Avengers. Now with more than 19 years of industry experience, Beamish takes a holistic approach to helping his clients plan for their fiscal futures.

"Fiscal education is important to me, and I believe in taking the time to help clients understand the wealth management process," Beamish said. "Then I partner with my clients to put together a financial plan they are truly comfortable with and work with them every step of the way to help them work towards both their long and short-term financial goals."

### **Why he made the move to Linsco by LPL**

Looking for more autonomy and enhanced technology, Beamish turned to LPL for the next chapter of his business. He was drawn to the Linsco model, which serves financial advisors seeking the core tenets of independence, including owning their client relationships and having flexibility to run their practice, their way. With Linsco, advisors have access to LPL's integrated wealth management platform and robust business resources, along with the additional benefits of having support from an experienced branch management team, dedicated marketing consultant and other resources that allow advisors to focus on their clients.

"After doing my due diligence, it was clear that LPL was the right partner to help me take my business to the next level," Beamish said. "My clients trust me to make the best decisions regarding their finances, and they deserve the best products and services available in the marketplace. From LPL's strategic support, [innovative technology](#) and shared focus on putting clients first, I am confident that moving to LPL is the right decision for my business."

Scott Posner, LPL Managing Director, Business Development, said, "We welcome Colin to the Linsco community. With LPL's support, more advisors are recognizing the importance of freedom and flexibility as they seek ways to differentiate themselves and enhance the client experience. We look forward to partnering with Beamish Wealth Management for years to come."

### **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 over 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](http://www.lpl.com).

### **Securities and advisory services offered through LPL Financial LLC ("LPL Financial"), a registered investment advisor and broker-dealer, member FINRA/SIPC.**

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.*

### **Media Contact:**

[Media.relations@LPLFinancial.com](mailto:Media.relations@LPLFinancial.com)

Tracking #735639

