



LPL Financial Welcomes Loomis Wealth Management

Jun 5, 2025

SAN DIEGO, June 05, 2025 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisors William “Bill” Curtis Loomis, III, CFP®, William Curtis “Curt” Loomis, IV and Justin K. Hitt of [Loomis Wealth Management](#) have joined LPL Financial’s broker-dealer, Registered Investment Advisor (RIA) and custodial platforms. The team reported serving approximately \$180 million in advisory, brokerage and retirement plan assets* and joins LPL from L.M. Kohn & Company.

Based in Harrisonburg, Va., Bill and Curt founded Loomis Wealth Management in 2010 with the goal of empowering individuals and families to achieve their financial goals through comprehensive, fiduciary-driven wealth management. The father and son team have a combined six decades of financial industry experience and have earned a reputation in the Shenandoah Valley for their holistic approach to wealth management. Hitt, who spent a decade as an educator for the Rockingham County Public Schools before transitioning to the financial industry, joined the team in 2023. Together they offer a full range of investment management, financial planning and risk management services, allowing them to address all aspects of their clients’ financial lives.

“We take the time to get to know our clients, their lifestyle, their family and their financial aspirations. Our personal service does more than just build bonds; it gives us a greater sense of how to work for our clients,” Curt said. “We appreciate that just as no two snowflakes are alike, no two investment portfolios will be identical. Who our clients are, how they live and their fiscal goals provide insight into how we can help.”

Looking for more autonomy, improved technology offerings and the opportunity to provide an elevated client experience, the Loomis Wealth Management team turned to LPL.

“LPL is a forward-thinking firm, and one aspect that particularly attracted us is their ongoing investment in resources to help advisors provide a next-level client experience — specifically their integrated and open architecture [technology platform](#) which will enable us to access everything with a single sign-on,” said Hitt. “LPL’s commitment to its advisors, paired with our personal and in-depth approach, will allow us to serve our clients and build our business the way we envision.”

Scott Posner, LPL Managing Director, Business Development, said, “We welcome Bill, Curt and Justin to LPL and congratulate them on this milestone in the evolution of their practice. Just as the Loomis Wealth Management team prioritizes their clients, everything we do at LPL revolves around empowering advisors to run thriving practices and provide an elevated client experience. We look forward to a long-lasting relationship with Loomis Wealth Management.”

Related

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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 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. Loomis Wealth Management 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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