



LPL Financial Welcomes Wyatt Wealth Management

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SAN DIEGO, June 26, 2025 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisor Jason Wyatt, AWMA®, has joined LPL Financial's broker-dealer, Registered Investment Advisor (RIA) and custodial platforms to launch [Wyatt Wealth Management](#). He reported serving approximately \$180 million in advisory, brokerage and retirement plan assets* and joins LPL from Wells Fargo Advisors.

Based in Bryan, Texas, home to Texas A&M University, Wyatt was introduced to the financial services industry as a college student working in a Dallas restaurant. Two of his regular customers were financial advisors and encouraged him to interview for a job. Now, with more than 30 years of financial industry experience, Wyatt has earned a reputation as an advisor who takes an individualized approach to wealth management, offering his clients, who are mostly near or in retirement, personalized and holistic experiences with the goal of helping them navigate their financial journey with confidence.

"We pride ourselves on treating clients like family, creating a caring environment where they feel confident in the guidance they receive," Wyatt said. "Whether our clients are planning for retirement, managing their investments or considering their legacy, we are here to help support them every step of the way. Our mission is to empower our clients with the knowledge and tools to make informed decisions, helping to certify that their financial journey aligns with their values and aspirations."

Looking for more freedom, flexibility and a new partner to help him grow his practice free of proprietary products, Wyatt and his team turned to LPL Financial following an extensive due diligence process.

"I see this move to LPL as an opportunity to regain my independence and to grow my business my way," Wyatt said. "LPL does not offer proprietary investment products, which allows us to provide the appropriate products and services for our clients. And, because our clients are at the center of everything we do, we are even expanding our staff and office space to provide a next-level experience that allows us to better serve our clients."

Scott Posner, LPL Managing Director, Business Development, said, "We welcome Jason and his team to the LPL community and congratulate him 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 Wyatt Wealth Management for years to come."

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 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.

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

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