LPL Financial

LPL Financial Welcomes Resilient Wealth Management

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SAN DIEGO, July 01, 2025 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Brandon Dixon-James, CFP®, has joined LPL Financial's broker-dealer, Registered Investment Advisor (RIA) and custodial platforms to launch Resilient Wealth Management. He reported serving approximately $250 million in advisory, brokerage and retirement plan assets* and joins LPL from Osaic.

Based in Fresno, Calif., Dixon-James founded Resilient Wealth Management in 2020 with the goal of providing his clients, who are mostly nearing or in retirement, with personalized support and dedicated guidance to help them pursue their fiscal goals. Supported by his team — Director of Client Events and Dixon-James' wife Nicole James, Operations Associate Edith Corrales and Front Office Representative Amelia Kitchens — Dixon-James takes a holistic approach to wealth management. Through high-touch, high-engagement service, he offers personalized, strategic and empathetic advice tailored to his clients' individual goals and circumstances.

"Our team seeks to redefine financial relationships by fostering an environment where inclusivity, clarity and dedication promote collaborative growth and help enable financial success," Dixon-James said. "Just as the name of our firm represents, we believe in walking in lockstep with our clients, helping them navigate financial challenges and surprises and ultimately strengthening their financial well-being and ability to recover from unexpected events."

Looking for improved technology and the opportunity to provide an elevated client experience, Dixon-James embarked on an extensive due diligence process that led him and his team to LPL.

"Making the move to LPL is an incredible opportunity for me to create the best version of my business," Dixon-James said. "From LPL's integrated and streamlined technology to the fact that they are self-clearing, everything LPL offers is with advisors in mind. But what solidified my decision to move to LPL is their commitment to the communities they serve and the fact they offer various Financial Advisor Inclusion programs, like the Black Financial Advisor Community."

Outside of the office, Dixon-James enjoys spending time with his wife and two children. Together, they are active in their church and enjoy spending time supporting their children's interests and sports. Dixon-James also shares a passion for giving back to his surrounding community. He's an active volunteer in Fresno-area underserved communities and regularly offers financial literacy courses to young people. He is a member of Kappa Alpha Psi Fraternity, Inc., and volunteers for the CFP Board Center for Financial Planning.

Scott Posner, LPL Managing Director, Business Development, said, "We welcome Brandon, Nicole, Edith and Amelia to LPL and congratulate them on this next chapter of their business. LPL is committed to delivering innovative technology and comprehensive business solutions to help advisors differentiate their practices and increase value for their clients. We look forward to supporting Resilient Wealth Management 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. Resilient 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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