



## Bell Wealth Partners Launches with Support of LPL Strategic Wealth Services

Jul 8, 2025

SAN DIEGO, July 08, 2025 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that father and son financial advisors Robert Bell, II, AIF®, and Keegan Bell, AIF®, AAMS®, have launched a new independent practice, [Bell Wealth Partners](#), through affiliation with LPL Financial's supported independence model, [LPL Strategic Wealth Services](#). The team reported serving approximately \$450 million in advisory, brokerage and retirement plan assets\* and joins LPL from Raymond James.

Headquartered in Fairbanks, Alaska with an additional office in Medford, Ore., the ensemble practice has developed a strong reputation over the years for providing holistic experiences and personalized services to address each aspect of a client's financial life. The Bells are managing partners of the firm and are joined by fellow advisor Tom Cook and client associates Renee Schoettle, Margarita Duran-Espino, Jamie Walker and Kirsten Bell, Robert's wife.

"We are all deeply invested in helping our clients work toward their financial goals," Robert said. "We take the time to get to know each client on a personal level to better understand their financial aspirations, and we work with their accountants and attorneys to create a customized plan that is right for them. It's our goal to help clients have happy, fulfilled lives, and we consider it our privilege and responsibility to help them with that."

### Why they made the move to LPL Financial

The transition to LPL Financial is underpinned by the team's aspiration to augment client experiences and cater to the next generation of wealth.

"We're moving to LPL so we can add more value to the client experience as we seek new ways to go above and beyond," Keegan said. "We want to be a one-stop shop—a center to help with a clients' entire financial situation. This move allows us to really increase that value add and better take care of them, not just for them but for the next generation of wealth and the transfer to their beneficiaries."

The team was drawn to LPL's comprehensive supported independence solution, LPL Strategic Wealth Services (SW), which combines the freedom and flexibility of entrepreneurship with hands-on business services and support to help practices thrive, both operationally and strategically. In addition to having access to LPL's innovative wealth management platform and sophisticated resources, SW advisors benefit from a truly integrated service that includes simplified pricing, technology and dedicated support to launch their practice. Then, after the transition is complete, SW teams receive ongoing operations support managed by their team of experienced professionals including a business strategist, marketing partner, CFO and administrative assistant. Advisors have one point of contact, a dedicated team and priority access to advocacy and project management for complex business issues, ultimately allowing them to stay focused on the enduring needs of their clients and the culture and evolution of their practice.

"Strategic Wealth Services was truly a differentiating factor in our decision to move," Robert said. "We are joining a very niche group at LPL, which allows us to collaborate with others in the model and access a team of specialists, including high-net-worth and trust consultants. This move enables us to add an extra layer of planning and ensure we're not just taking care of clients now, but their beneficiaries as well."

Scott Posner, LPL Managing Director, Business Development, said, "We welcome Robert, Keegan, Tom, Renee, Margarita, Jamie and Kirsten to the LPL community and congratulate them on going independent with LPL Strategic Wealth. Just as the Bell Wealth Partners team is committed to helping their clients work toward their fiscal goals, LPL provides advisors with innovative technology and sophisticated capabilities to help them provide an elevated client experience. We look forward to supporting Bell Wealth Partners 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 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](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.**

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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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