



## LPL Financial Welcomes Gallagher Wealth Management

Jul 22, 2025

SAN DIEGO, July 22, 2025 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that Kevin Gallagher, AIF<sup>®</sup>, of [Gallagher Wealth Management](#) has joined LPL Financial's broker-dealer, Registered Investment Advisor (RIA) and custodial platforms. He reported serving approximately \$180 million in advisory, brokerage and retirement plan assets\* and joins LPL from Lincoln Investment.

Located north of Washington D.C. in Brookeville, Md., Gallagher started in the wealth management industry as a floor trader in 1997 following a career in the U.S. Marines. Now, with nearly two decades of financial industry experience, Gallagher has established a reputation as an advisor who takes an individualized approach to wealth management, offering clients — who are mostly former or current federal employees or members of the military — a personalized and collaborative experience.

"We believe that an advisor's role is to provide sage advice to their clients," Gallagher said. "At our practice, we take a collective approach to fostering a deep understanding of our clients' unique circumstances, motivations and fiscal goals and then educating them on the most appropriate strategies to help them work towards their long- and short-term goals."

Looking for more autonomy, flexibility and a more robust technology platform, the Gallagher Wealth Management team, which includes fellow advisors U.S. Army veteran James Horris, AIF<sup>®</sup>, CEPA<sup>®</sup>, Brandon Hsia, Leslie Weigand and their support staff, turned to LPL.

"LPL's culture, industry reputation and [integrated and streamlined technology](#) were exactly what we were looking for in our pursuit to provide an elevated client experience and take our business to the next level," Gallagher said. "Everything LPL offers — including the fact that they are self-clearing — will make it easier for us to run our business more efficiently and spend more time with our clients."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Kevin and the rest of the Gallagher Wealth Management team to LPL and congratulate them on this next phase of their business. As a leading wealth management firm, LPL is committed to delivering innovative technology and comprehensive business solutions that help advisors differentiate their practices and increase value for their clients. We look forward to supporting Gallagher 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 nearly 29,000 financial advisors and the wealth management practices of approximately 1,200 financial institutions, servicing and custodizing 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. Gallagher Wealth Management and LPL Financial are separate entities.

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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