LPL Financial

LPL Financial Welcomes Concentric Wealth Management

Aug 28, 2025

SAN DIEGO, Aug. 28, 2025 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that the advisors of Concentric Wealth Management have joined LPL Financial's broker-dealer, Registered Investment Advisor (RIA). They reported serving approximately $715 million in advisory, brokerage and retirement plan assets* and join LPL from Avantax by Cetera.

Based in Cincinnati, Ohio, the team is led by Patrick Burke, CPA® and Matt Tarka, AAMS®, CRPS®. The company started as an accounting firm over 40 years ago and expanded to wealth management 15 years ago. The advisors work with a broad spectrum of clients including business owners, retirees, and emerging affluent households. They also serve a large niche of other professional service providers.

"We are a one-stop-shop for our clients regardless of their stage of life. We provide highly skilled professional services through our wealth management practice," said Patrick Burke. "Our approach is collaborative and relationship driven. We work as a close-knit team and take a multifaceted approach to service our clients, with the end goal of providing a sense of clarity and comfort. Though financial planning can feel overwhelming at times, we focus on building trust and offering personalized guidance every step of the way."

Why Concentric Wealth Management chose LPL

After experiencing significant growth over the past two years, the Concentric Wealth Management team, which includes advisors Molly Myers, CFP®, CLU®, Nick Groman, Esq., CFP®, Tim Powell, CFP®, AIF®, Dean Johns, CPA®, CFP®, along with Paraplanner Jake Burke, CPA®, Client Services Associates Josh Wentz, CFP® and Justin Lehkamp, turned to industry leader LPL to support their long-term vision.

"After conducting extensive research, it became clear that LPL offers the foundation we need to operate a high-caliber advisory firm for high-net worth individuals," said Tarka. "The cutting-edge technology, robust capabilities and strong alternative investment platform allows us to deliver an exceptional client experience while having the infrastructure to allow us to attract top talent and expand our footprint with intention. With this alignment, we're equipped to accelerate our growth while staying rooted in our values."

Jake Burke added, "We view our broker-dealer relationship as an extension of how we serve our clients. We were seeking a partner who aligns with our values, supports our collaborative approach and shares our long-term vision. We found that partnership with LPL."

Scott Posner, Managing Director, Business Development, said, "We welcome the Concentric Wealth Management team to LPL. 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 the team for years to come."

Related

Advisors, learn how LPL Financial can help take your business to the next level.

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 1,100 financial institutions, servicing and custodying approximately $1.9 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. Concentric 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.*

Media Contact:
Media.relations@LPLFinancial.com

Tracking #774652