



LPL Financial Welcomes Gentle Family Wealth Partners

Oct 23, 2025

SAN DIEGO, Oct. 23, 2025 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that Shawn Gentle, AIF® of Gentle Family Wealth Partners has joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. He reported serving approximately \$280 million in advisory, brokerage and retirement plan assets* and joins LPL from Raymond James.

Based in Birmingham, Ala., Gentle brings 37 years of experience to his practice. His longstanding passion for economics and finance developed well before his time at the University of Alabama, where he continued to pursue diverse opportunities to deepen his industry knowledge. He serves clients throughout the Southeast, including retirees, business owners preparing to transfer their companies to the next generation, defense contractors and entrepreneurs. In addition, Gentle works closely with the National Christian Foundation and other charitable organizations by helping clients pursue their legacy and philanthropic goals through various charitable vehicles.

"I take the time to truly get to know my clients, their financial goals, their families, their companies, key employees and even the dynamics between family members. Now, I'm proud to be working with the third and fourth generations, which often happens when the process of estate and succession planning begins and introduces me to the next in line," said Gentle. "It's a natural evolution as families age, and I spend a lot of personal time with them, frequently being available during non-traditional work hours to consult on both financial and family matters when called upon. I especially enjoy working with clients who have legacy and philanthropic goals because our team can help them clarify and maximize their impact. The long-term impact in the greater community and even the world can extend many decades beyond the vision of the founding family."

Why Gentle Family Wealth Partners Chose LPL

Looking for improved technology and autonomy, Gentle embarked on an extensive due diligence process that led him to LPL.

"I chose to transition my practice to LPL's corporate RIA because it offers the support and resources of a leading financial organization while allowing me to maintain the independence and personalized approach of a boutique firm," said Gentle. "In today's environment, where cybersecurity and advanced technology are crucial, it's essential to partner with a very large, sophisticated financial services company that is deeply invested in these areas. LPL stands out for its robust commitment to technological innovation and its strong focus on cybersecurity."

Gentle continued, "I appreciate that LPL empowers advisors to shape their own practices and deliver personalized experiences to clients, all within a culture that values autonomy and individuality. Lastly, as advisors themselves age, we also need succession planning. Through LPL's vast resources in succession and practice acquisition, I plan to succeed retiring advisors and one day transition my own practice."

Scott Posner, managing director of business development, said, "We welcome Gentle Family Wealth Partners to the LPL community and are honored they turned to us to help elevate their practice. At LPL, we are deeply committed to helping businesses like Shawn's by investing in robust, integrated technology capabilities to help advisors provide a differentiated client experience and comprehensive practice management solutions to help them execute their long-term vision. We look forward to supporting him 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 custodialing 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. Figures provided as of June 30, 2025. 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. Gentle Family Wealth Partners 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 #814565