LPL Financial Welcomes Edge Wealth Advisory Group

Oct 28, 2025

SAN DIEGO, Oct. 28, 2025 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that the partners of Edge Wealth Advisory Group have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. They reported serving approximately $200 million in advisory, brokerage and retirement plan assets* and join LPL from Raymond James.

With offices located near the Austin, Texas area in Granite Shoals and Gonzales, the team consists of father-son duo John Edgecomb and Robb Edgecomb, CFP®, CRPC. They have a combined 65 years of experience. Their clients include business owners, retirees, those transitioning from working to retirement and clients who are just starting on their financial journey.

"At the end of the day, we strive to take the least amount of risk necessary to help our clients work towards their goals. I make it a priority to understand each client's entire financial situation, diving deep into their money psychology," said Robb Edgecomb. "We factor in every asset, lifestyle need and aspiration, considering future goals and potential purchases. Our approach involves a comprehensive analysis of 'what if' and worst-case scenarios, thinking outside the box to ensure our clients are well prepared."

Why Edge Wealth Advisory Group Chose LPL

Looking for greater independence, flexibility and access to advanced technology for their clients, the team turned to LPL.

"LPL's financial philosophy closely aligns with ours at Edge Wealth Advisory — they champion investors' rights to independent, comprehensive advice. We're proud to be part of an organization whose culture values transparency, diversity, ethical practices and a client-first mindset," said Robb Edgecomb. "My father is excited about the investment management and research platform, which will help him further enhance his portfolios, while I'm eager to utilize the advanced planning software I previewed — especially the opportunity to integrate AI into every aspect of our business. We are also excited about being backed by a large corporate RIA like LPL as we look to expand in Texas and the surrounding states."

Scott Posner, Managing Director, Business Development, said, "We welcome John and Robb to LPL and congratulate them on this milestone in the evolution of their practice. Just as the Edge Wealth Advisory team prioritizes their clients, everything we do at LPL revolves around empowering advisors to run thriving practices and provide an elevated client experience. We look forward to a long-lasting relationship with Edge Wealth Advisory Group."

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. 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. Edge Wealth Advisory Group 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.*

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