LPL Financial Welcomes Longstreet Wealth Management

Nov 19, 2025

SAN DIEGO, Nov. 19, 2025 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that the partners of Longstreet Wealth Management have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. They reported serving approximately $175 million in advisory, brokerage and retirement plan assets* and join LPL from Raymond James.

Located near Lubbock, Texas, with offices in Amarillo and Hereford, the team is comprised of Taylor Graves, CFP®, and Wayne Pierson. Together, they bring nearly four decades of combined experience and serve a diverse client base — including retired individuals, small business owners who are seeking guidance on succession planning, farmers, ranchers and entrepreneurs. Despite operating from different towns, the team enjoys collaborating and values the fresh perspectives each member brings, believing that sharing ideas leads to new opportunities.

"We like to spend a lot of time with our clients, offering a personal touch and embracing genuine empathy. Our goal is to help clients navigate their uncertainties and fears, and to let them know that we truly understand what they're going through," said Pierson. "Clients look to us for confirmation and guidance, and we strive to keep their expectations balanced. By intentionally serving fewer clients, we're able to build deeper relationships and have the capacity to take care of each one thoughtfully. Our business is built on purpose and intention."

Graves continued, "We feel we're distinct in the way we approach our client relationships. We obviously want good financial outcomes for all of our clients, but we also truly care about them and their families and want to be there to celebrate the good times and offer guidance when times get tough."

Why Longstreet Wealth Management Chose LPL

Looking for greater flexibility and access to advanced technology for their clients, the team — which also includes Client Relationship Manager Rosanne Klein and Sales Assistant Megan Pierson — turned to LPL.

"We decided to align with LPL primarily because their technology platform works seamlessly with our customer relationship management (CRM) software and other tools we utilize in our practice. Building integrations with our CRM and our AI meeting management tool will add efficiency and capacity to our practice while delivering a sophisticated client experience," said Graves.

Pierson said, "In addition to advanced technology, there will be more robust options available within the alternative investments space."

Scott Posner, Managing Director, Business Development, said, "We welcome Taylor and Wayne to the LPL community. 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 Longstreet Wealth Management 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 over 32,000 financial advisors and the wealth management practices of approximately 1,100 financial institutions, servicing and custodying approximately $2.3 trillion in brokerage and advisory assets on behalf of approximately 8 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.

**Value approximated based on asset and holding details provided to LPL from end of year, 2024.*

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