LPL Financial Welcomes Kūpono Wealth Planning

Dec 2, 2025

SAN DIEGO, Dec. 02, 2025 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that Brandon Wallis, CFP®, CRPS™, of Kūpono Wealth Planning has joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. He reported serving approximately $145 million in advisory, brokerage, and retirement plan assets* and joins LPL from Edward Jones.

Kūpono Wealth Planning is based in Mililani, Hawai'i, just 20 miles from Honolulu, and proudly serves the Central Oahu and North Shore communities.

With two decades of industry experience, Brandon has called Hawai'i home since 2007. Brandon works with a diverse clientele, including individuals who have retired within the last decade, those planning to retire in the next five years, as well as many mainland transplants, medical professionals, and small business owners.

"We chose the name Kūpono Wealth Planning, for what it stands for and as a benchmark for how we treat clients. Kūpono means to act with integrity, fairness, and moral strength. On a daily basis we want to operate with professionalism and integrity, providing reliable advice and unwavering attention to detail. Our goal is to build a practice to reflect the values and unique challenges of local families. Hawai'i clients often face specific pressures such as sandwich generation challenges or mainland family travel costs. We balance the needs of aging parents with helping adult children navigate the high cost of living. We're committed to simplifying complex financial matters, learning each client's story, and helping them make informed and realistic decisions," Brandon said.

"What sets us apart is our breadth and depth of experience, our candid approach, and our dedication to client service and cost efficiency. Every portfolio we design is built on trusted principles, emphasizing diversification, cost-conscious investing, and a flexible, disciplined strategy that always reflects each client's individual goals and comfort level," Brandon added.

Why Kūpono Wealth Planning Chose LPL

Seeking greater autonomy and flexibility for his clients, Brandon embarked on an extensive due diligence process that led him to LPL.

"After considering 20 other firms, I realized I wanted the independence and flexibility to build a practice that truly reflects our values and vision. We wanted to make decisions in Mililani and not have them made on the mainland for us. Decisions with an understanding of our client ohana in mind, not people cubicles in corporate parks. With LPL, we can now offer a tremendously wide range of solutions and strategies and are able to lower costs for most of my clients, all while having the financial support of an organization that has almost 32,000 advisors. LPL's independent infrastructure allows us to deliver Ritz Carlton service and Fedex efficiency wrapped in the aloha spirit," Brandon said.

Scott Posner, managing director of business development, said, "We are pleased to welcome Brandon to LPL and wish him all the best as he embarks on this new phase of his business. As more advisors look for flexible ways to build their ideal practices, we remain committed to providing comprehensive solutions and strategic wealth management resources that add value for clients and help create successful practices. We look forward to supporting Kūpono Wealth Planning well into the future."

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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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