



LPL Financial Welcomes Oak Bridge Financial, LLC

Jan 14, 2026

SAN DIEGO, Jan. 14, 2026 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that the financial advisors of [Oak Bridge Financial, LLC](#) have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. They reported serving approximately \$230 million in advisory, brokerage and retirement plan assets* and join LPL from Ameriprise.

Based in Houston, Oak Bridge is led by industry veterans Peter Goudeau Jr. LUTCF[®], CLU[®], ChFC[®], RICP[®], APMA[®], and Larry Boyd MBA, APMA[®], LUTCF[®], who bring a combined 45 years' experience and founded the firm in 2007. The firm serves a nationwide clientele — spanning Houston, Washington, D.C., Atlanta and Seattle — focusing on high-net-worth professionals whether they are accumulating assets, approaching or in retirement, including physicians, attorneys, Olympic athletes, entrepreneurs and business owners.

Oak Bridge's team features advisors with backgrounds in fields like real estate, computer science, banking, and engineering. This diversity of experience gives Oak Bridge advisors a broader perspective, enabling them to craft strategies that go beyond numbers and reflect the varied lives and goals of their clients.

"Our clients benefit from advisors with varied expertise, which helps us deliver an end-to-end client experience and collaborate effectively. We have built out an impressive, comprehensive "A to Z" experience for our clients and to use each other as sounding boards," said Goudeau Jr. "Unlike most firms in the industry, we build and manage portfolios ourselves, handling all research, modeling and trading."

Why Oak Bridge Financial, LLC Chose LPL

Oak Bridge's decision to transition to LPL followed an extensive due diligence process focused on operational flexibility and technological innovation. The team, which also includes Pete Goudeau III, CFP[®], APMA[®], Andrew Brereton, CFP[®], ChFC[®], APMA[®], Jeffrey Keown CFP[®] and Kingsley Davis APMA[®], sought a partner that would allow them to maintain full ownership of their client relationships, data, and business processes.

"We wanted autonomy to run our business the way we see fit," said Goudeau Jr. "Our clients rely on us for immediate, transparent access to their information. LPL provides the robust infrastructure and open-architecture technology tools we need to provide a superior, data-drive client experience while maintaining our firm's independence and diverse culture."

Scott Posner, managing director of business development, said, "We welcome Peter and Larry to LPL and congratulate them on this next chapter of their business. 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 Oak Bridge Financial for years to come."

Related

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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 custodialing 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.

Securities and advisory services offered through LPL Financial LLC ("LPL Financial"), a registered investment adviser and broker-dealer. Member FINRA/SIPC. Oak Bridge Financial, LLC and LPL Financial are separate entities.

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

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