LPL and Private Advisor Group Welcome Wilson Peak Wealth Management

Jan 22, 2026

SAN DIEGO, Jan. 22, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Jeffrey J. Wilson, CFP®, and Michael Sadowski, CFP®, of Wilson Peak Wealth Management Inc. have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform and will be leveraging Private Advisor Group's infrastructure for the next stage of their growth. They reported serving approximately $150 million in advisory, brokerage and retirement plan assets* and join LPL from Wells Fargo Advisors.

Located in Upper Saddle River, New Jersey, within the metropolitan New York area, Wilson Peak Wealth Management was founded by Wilson, who has 20 years of industry experience. The team provides comprehensive financial planning services, specializing in tax and estate planning strategies, and they serve professionals, next generation accumulators, retirees, entrepreneurs and families. They have built long-term relationships with clients and their families, working together to ensure that they're on target to meet their financial goals.

"We are independent by choice which allows me and my team to provide individualized, premium service to each of our clients. I make decisions about technology, team members, investments and service schedules that are in my clients' best interests," said Wilson. "I have structured my practice with recurring systems: a multiple-step client process, a quarterly service matrix, easy accessibility, proactive communication and a personal financial organizer to help our clients define their financial goals. I'm continuously looking to raise the bar for client service, whether its providing new services and technology or training new team members."

Why Wilson Peak Wealth Management Chose LPL

Seeking continued autonomy and access to advanced technology for their clients, the team – which also includes Director of Operations Stacy Wilson – turned to LPL.

"I knew I wanted more freedom around technology and estate and tax planning tools to use with my clients. LPL Financial's only mission is to support independent advisors. Fundamentally, LPL allows me to run Wilson Peak Wealth Management in a way that best serves our clients," said Wilson.

Scott Posner, managing director of business development at LPL, said, "We welcome Jeffrey and his team to the LPL community and congratulate them on the move to independence. With more freedom and flexibility, financial advisors who choose LPL can work more effectively, run thriving practices and create value for their clients. We look forward to supporting Wilson Peak Wealth Management for years to come."

"We're delighted to welcome Jeff, Stacy and Michael to Private Advisor Group. From the moment we connected, it was clear how deeply they care about their clients and the future of their practice. They've been an absolute pleasure to work with, and I'm genuinely excited to watch them leave their mark across the Private Advisor Group and LPL communities as they continue to grow, tap into new resources and deepen the remarkable service they provide to clients," said Karen Hayes, business development consultant at Private Advisor Group.

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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.

Securities and advisory services offered through LPL Financial LLC ("LPL Financial"), a registered investment adviser and broker-dealer. Member FINRA/SIPC. Wilson Peak Wealth Management, Private Advisor Group 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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