LPL Financial Welcomes Wealth Innovations

Feb 3, 2026

SAN DIEGO, Feb. 03, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that the financial advisors of Wealth Innovations, LLC 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 Osaic.

Based in Richmond, Va., Wealth Innovations is led by industry veteran Jim LaNeave, who brings nearly four decades of leadership and financial planning experience, alongside Marian Crawford, CFP®, and Samuel LaNeave. The team also includes Ashley LaNeave, Jeffery Brallier, Diane Norris and Janyce LaNeave. Together, they serve clients primarily along the Eastern Seaboard, focusing on individuals at or near retirement.

Wealth Innovations specializes in comprehensive retirement planning through their SWAN Plan — an approach designed with a goal to help clients "Sleep Well At Night." This strategy emphasizes retirement readiness, income preservation, risk mitigation and legacy planning, ensuring clients can confidently transition from work to retirement with clarity and financial freedom.

"Our goal is to provide clients with confidence and clarity," said Crawford. "We take the time to understand every aspect of their lives, not just their finances, and craft plans that allow them to enjoy retirement without worry. We want clients to feel informed and never pressured — our focus is on delivering value through personalized planning and education."

Why Wealth Innovations, LLC Chose LPL

LaNeave and team's decision to join LPL was driven by its robust technology ecosystem and integrated platform.

"LPL offers an integrated platform that brings everything under one roof — streamlined operations, advanced planning tools and robust compliance support," said Jim LaNeave. "We were impressed by LPL's ability to deliver both operational efficiency and an enhanced client experience. This relationship empowers us to maintain our independence while focusing on what matters most: delivering personalized, unhurried service and comprehensive retirement strategies."

Scott Posner, managing director of business development, said, "We welcome Jim, Marian, Samuel and the entire Wealth Innovations team to the LPL community. Just as they prioritize delivering personalized service and thoughtful planning for their clients, at LPL we empower advisors to run thriving, independent practices designed their way. With our integrated technology and comprehensive business solutions, we look forward to supporting their growth and success for many years to come."

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 32,000 financial advisors and the wealth management practices of approximately 1,200 financial institutions, servicing and custodying approximately $2.4 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. Wealth Innovations, LLC and LPL Financial are separate entities.

Throughout this communication, the terms "financial advisors" and "advisors" are used to refer to the registered representatives and/or investment advisor representatives affiliated with LPL Financial and LPL Enterprise.

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

Media Contact:
Media.relations@LPLFinancial.com

Tracking #1058160