LPL Financial Welcomes Shoreline Private Wealth Management

Feb 17, 2026

SAN DIEGO, Feb. 17, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that Jason Mochi of Shoreline Private Wealth Management has joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. They reported serving approximately $275 million in advisory, brokerage and retirement plan assets* and join LPL from Morgan Stanley.

Based in Santa Barbara, Calif., Mochi brings over 30 years of industry experience and serves a clientele of high-net-worth individuals, primarily those nearing or in retirement. His approach is rooted in listening, disciplined strategy and independent judgment, delivering wealth management aligned with clients' long-term goals and best interests.

"Shoreline offers a white glove, boutique, family focused office experience, built on personal attention and long-term relationships rather than transactional interactions," said Mochi. "We emphasize clarity, comprehensive planning, and an environment where independence keeps the client's best interest at the center of every decision."

Why Shoreline Private Wealth Management Chose LPL

The Shoreline team — which also includes Client Relationship Manager Janet Waller — selected LPL for its scale, platform strength, and support for a high touch, client first service model.

"With independence as the foundation, I chose LPL for its scale and platform because it enables us to deliver customized advice and a high touch client experience without compromise," said Mochi. "By becoming independent, we are sharpening our focus on what matters most — our clients. Every decision we make is guided by our responsibility to act in our clients' best interests. Technology and independence give us the freedom to choose best-in-class tools that elevate advice and deepen personalization."

Scott Posner, managing director of business development at LPL, said, "We are excited to welcome Jason to LPL. His commitment to independence, personalization and delivering a top-notch client experience aligns with LPL's mission to equip advisors with the innovative technology and comprehensive business solutions they need to grow and differentiate their practices. We look forward to supporting Shoreline as they embark on this next chapter."

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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 1,200 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. Shoreline Private Wealth Management 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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