LPL Financial

Legacy Ridge Private Wealth Joins LPL Strategic Wealth

Mar 12, 2026

SAN DIEGO, March 12, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Frank Boley, CFA®, CFP®, CIMA® and Susie Garber-Johnson, CWS® have launched a new independent practice, Legacy Ridge Private Wealth, through affiliation with LPL Financial's supported independence model, LPL Strategic Wealth. They reported serving approximately $600 million in advisory, brokerage and retirement plan assets* and join LPL from D.A. Davidson.

Based in Sheridan, Wyo., Boley and Garber-Johnson have 50 years of experience and are both sixth generation Wyomingites. Boley and Garber-Johnson partnered to create a firm rooted in Wyoming heritage and designed for sophistication. Their business model centers on delivering comprehensive, family focused office services — including portfolio management, tax strategy and legacy creation — through their proprietary LegacyWorth™ framework. Legacy Ridge Private Wealth serves clients with complex financial needs, including pre-retirees and retirees, business owners and multigenerational families seeking customized strategies beyond traditional wealth management.

"Our team is comfortable offering customized strategies for complex needs; we see the world through a different lens through our LegacyWorth™ framework," said Boley. "LegacyWorth™ is our client first- framework that looks beyond portfolios to align wealth with purpose. We bring together discovery, cashflow planning, tax strategy, legal coordination and multigenerational family meetings in one seamless, transparent process — delivering family focused office sophistication to Sheridan and the broader Wyoming community."

Why They Made the Move to LPL and Why Now

After a due diligence period, the team chose to affiliate via LPL's comprehensive supported independence solution, LPL Strategic Wealth (SW). SW combines the freedom and flexibility of entrepreneurship with hands-on business services and support to help practices thrive, both operationally and strategically. The Legacy Ridge Private Wealth team includes Olivia Koltiska, Brenna Zink and Janelle Kemerling.

"After interviewing multiple potential partners, we proactively chose LPL for its strategic platform and comprehensive suite of services," said Boley. "LPL gives us the ability to deliver a transparent, seamless experience for clients with complex needs — combining portfolio management, tax planning, and legacy planning under one roof. This partnership allows us to focus on what matters most: helping clients pursue their goals without the burden of managing multiple advisors."

In addition to having access to LPL's comprehensive wealth management platform and sophisticated resources, SW advisors benefit from an integrated service that includes simplified pricing, technology and dedicated support to launch their practice. After the transition is complete, SW teams receive ongoing operations support managed by a team of experienced professionals, including a business strategist, marketing partner, CFO and administrative assistant. Advisors have one point of contact, a dedicated team and priority access to advocacy and project management for complex business issues, ultimately allowing them to stay focused on the enduring needs of their clients and the culture and evolution of their practice.

Scott Posner, managing director of business development, said, "We welcome the Legacy Ridge Private Wealth team and congratulate them on going independent with LPL Strategic Wealth. As they build their ideal practice to provide comprehensive client service, LPL is here to provide comprehensive practice support throughout their entire journey as independent advisors. We are committed to delivering sophisticated resources, innovative capabilities and strategic business solutions designed to help advisors build value with clients and win in the markets they serve."

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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 advisor and broker-dealer, member FINRA/SIPC. Legacy Ridge Private Wealth, LegacyWorth™ and LPL Financial are separate entities.

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

We routinely disclose information that may be important to shareholders in the “Investor Relations” or “ Press Releases” section of our website.

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

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