LPL Financial Welcomes Consilium Wealth

Mar 17, 2026

SAN DIEGO, March 17, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that advisors Stephen Horvath, CHFC®, CLU®, CEP®, AIF®, Brady Doe, AIF® and David Hermann have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform to form Consilium Wealth. The team reported serving over $250 million in advisory, brokerage and retirement plan assets.* Horvath and Doe join LPL from Cambridge Investment and Hermann joins from First Heartland Capital.

Located in Tucson, Ariz., the team has nearly 60 years of combined experience and specializes in supporting retired and retiring university professors, primarily from the local universities. Educators represent the majority of Consilium Wealth's client base, but they also serve individuals and families referred to through the academic community. Consilium Wealth provides comprehensive, goals-based financial planning, supported by an experienced staff and a philosophy centered on long-term relationships and multi-generational guidance.

"Our commitment extends not only to our clients, but also to their children, grandchildren and philanthropic interests," said Horvath. "We help families plan across generations through comprehensive strategies designed with a goal to grow and protect wealth, reduce tax burdens and ensure the orderly distribution of assets to heirs and charitable causes. We believe financial planning should support every chapter of a family's legacy with clarity, intention and care."

Why Consilium Wealth Chose LPL

The Consilium team selected LPL for its scale, resources and advisor-focused platform designed to enhance support for advisors and improve the end-client experience.

"LPL stood out for its robust investment research department, extended support hours through its West Coast headquarters and the simplicity of its combined clearing and broker-dealer model. These advantages will strengthen our ability to operate efficiently and better serve our clients," said Horvath.

Scott Posner, managing director of business development at LPL, said, "We are pleased to welcome Consilium Wealth to LPL. Their commitment to deeply personalized, high-touch service aligns with LPL's mission to empower advisors with the independence, technology and support needed to run their sound, thriving practice."

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.

**Value approximated based on asset and holding details provided to LPL from end of year, 2025.*

Media Contact:
Media.relations@LPLFinancial.com

Tracking #1078587