



LPL Financial Welcomes Five Star Wealth Planning

Mar 31, 2026

SAN DIEGO, March 31, 2026 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisor Tasha Coleman, CFP®, founder of Five Star Wealth Planning, has joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. They report serving approximately \$185 million in advisory, brokerage and retirement plan assets* and join LPL from Osaic.

Based in Minnesota, Coleman brings over 20 years of industry experience, supporting individuals and families preparing for retirement and guiding them through complex wealth transfer planning. She describes her approach as deeply relational and education driven. Every client receives a customized financial plan reflecting their personal comfort level, goals and long-term retirement vision.

"At its core, this transition isn't about platforms — it's about people," said Coleman. "For more than 20 years, I've had the privilege of walking alongside families through retirement, life transitions and generational planning. Clients often tell us we feel like a boutique firm with big firm resources, and this move reinforces that — preserving the relationships they value while strengthening the infrastructure behind them."

Why Five Star Wealth Planning Chose LPL

The Five Star Wealth Planning team — which also includes Andrew Bjorklund, Roberta Porter and Raelyn Segre — selected LPL for its technology, AI advancement and cybersecurity protections.

"I chose LPL because their technology is far superior to any other firm we evaluated," said Coleman. "With AI evolving faster than ever, it was essential to align my clients with a firm that not only invests in innovation but does so with the advisor-client relationship at the center. Additionally, LPL's commitment to cybersecurity coverage gives me complete confidence that my clients' futures are protected."

"Our practice has always been built on community — from Forest Lake to the Twin Cities and beyond," Coleman added. "This transition allows us to continue serving multigenerational families while staying deeply rooted where it all began."

Scott Posner, managing director of business development at LPL, said, "We are happy to welcome the Five Star Wealth Planning team to LPL. Tasha's commitment to educating clients, guiding families through major life transitions and delivering deeply personalized planning reflects the best of our advisor community. The team's dedication to long-term relationships aligns with LPL's mission to empower advisors with the freedom, technology and comprehensive resources they need to serve their clients with excellence. We look forward to supporting Tasha and her team as they continue to grow."

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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 custodialing 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. Five Star Wealth Planning and LPL Financial are separate entities.

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

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