



LPL Financial Welcomes Advisor Trey Pope

Apr 2, 2026

SAN DIEGO, April 02, 2026 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that Trey Pope, CRPC®, ABFP®, has joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. Pope reported serving approximately \$160 million in advisory, brokerage and retirement plan assets* and joins LPL from Edward Jones.

Based outside of Huntsville, Alabama, Pope brings more than a decade of industry experience and serves a diverse client base that includes engineers, medical professionals, government employees and retirees, many of whom are in their peak earning years or planning for retirement. His practice is built around long-term relationships and a planning-first approach designed to help clients align their financial strategies with their personal values, long-term goals and legacy objectives.

"Every relationship starts with listening," said Pope. "Before we ever talk about investments, I want to understand what matters most to my clients — their goals, concerns and aspirations. From there, I use comprehensive planning and disciplined analysis to clearly show where they are today, detail where they're headed and make adjustments to stay on track."

Why Trey Pope Chose LPL

After an extensive due diligence process, Pope selected LPL for the scale, technology and resources that will empower him to operate more efficiently while enhancing the client experience.

"I spent more than a year conducting due diligence and was ultimately blown away by LPL's expansive resources and the depth of support available to advisors," said Pope. "The technology and tools at LPL meaningfully expand how I can serve my clients, and the firm's economies of scale allow me to run my business more efficiently while sharing those benefits with the families I work with. The support I've already experienced firsthand made it clear that LPL was the right long-term partner for my practice and my clients."

Scott Posner, managing director of business development at LPL, said, "We are pleased to welcome Trey to LPL. His commitment to thoughtful planning, deep client relationships and values-driven advice aligns with LPL's mission to empower advisors with the independence, technology and support they need to deliver differentiated service."

Pope is active in his local community and serves on the finance committee at his church. He and his wife, Sarah, have two young daughters and are deeply rooted in the Huntsville area. Outside of the office, he enjoys fly fishing and spending time with his family.

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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.

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.

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

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