LPL Financial

LPL Welcomes Emerald Legacy Advisors

Apr 7, 2026

SAN DIEGO, April 07, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that the financial advisors of Emerald Legacy Advisors have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. The team reported serving approximately $140 million in advisory, brokerage and retirement plan assets.* They join LPL from Wells Fargo Advisors Financial Network.

Based in Kansas City, Mo., Emerald Legacy Advisors is built on decades of experience and intergenerational ties within the financial services industry. Managing partners Jim McMurtry, CFP® and Allie Konieczka — daughter of McMurtry's retired longtime business partner, Colleen Konieczka — lead the firm alongside McMurtry's daughter, Michelle Reek, carrying the practice's esteemed legacy forward. The firm officially rebranded to Emerald Legacy Advisors in January 2024, reflecting the firm's intergenerational roots and long-term vision.

McMurtry, Konieczka and Reek deliver comprehensive financial planning to individuals and families navigating retirement, major life transitions and long-term wealth planning. Emerald Legacy serves a diverse client base, with a growing focus on young professionals, women, business owners and multigenerational households seeking personalized, relationship-driven advice. The firm operates a collaborative, team-based model in which each client works directly with a dedicated advisor, supported by the broader Emerald Legacy practice to ensure continuity, accessibility and holistic guidance.

"Our goal is for every client to feel welcomed, understood and confident from their very first meeting," said Konieczka **.** "We take a highly personalized approach — listening first, asking the right questions and tailoring strategies to align our clients' financial decisions with what matters most in their lives. There is no one-size-fits-all solution here and we believe that trust and clarity are the foundation of long-term success."

Why Emerald Legacy Advisors Chose LPL

The Emerald Legacy team selected LPL Financial for its scale, independence and access to robust research, technology and investment solutions.

"After careful consideration, we chose LPL because its independent platform gives us the flexibility to serve our clients the way we believe is best," said McMurtry.

"LPL's access to independent research and a broad range of investment and insurance solutions allows us to provide more personalized, tailored guidance — without the limitations of rigid, one-size-fits-all policies. This move strengthens our ability to put our clients' needs first while preserving the relationships and service experience they value," added Reek.

Scott Posner, managing director of business development at LPL, said, "We are pleased to welcome Emerald Legacy Advisors to LPL. Their collaborative culture, commitment to personalized planning and focus on serving clients through life's transitions align well with LPL's mission to empower advisors with the independence, technology and support they need to build thriving, client-centered practices."

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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. Emerald Legacy Advisors 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, 2025.*

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