



LPL Financial Welcomes Capital Investment Services

May 5, 2026

SAN DIEGO, May 05, 2026 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisors Bobby Lumpkin, Cindy Little and Allina Bell of [Capital Investment Services](#) have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. The firm reports approximately \$775 million in advisory, brokerage and retirement plan assets* and joins LPL from Raymond James.

Capital Investment Services serves a broad client base that includes entrepreneurs, business owners, multigenerational households and individuals at every stage of the retirement journey. They are based in LaGrange, Ga., approximately 60 miles southwest of Atlanta. The team's client philosophy is rooted in deep personal connection, faith and a steadfast commitment to changing lives — not just managing money.

With 24 years of industry experience, Lumpkin has been named to the *Forbes* list of Best-in-State Wealth Advisors for 2024, 2025 and 2026, an achievement recognized as part of his longstanding dedication to client-first service.**

While reflecting on the importance of his team, Lumpkin said, "These achievements are truly a team effort. To effectively meet the needs of our clients daily, it takes a team of professionals that are completely committed to our mission of building long term client relationships."

Capital Investment Services is grounded in a strong culture shaped by its core values, which inform every client interaction, planning conversation and investment decision the firm makes. The primary goal is to help clients achieve their financial goals and supporting them through life's defining moments.

"Our relationships are built on a relational connection and a commitment to doing what is in our clients' best interests," Lumpkin said. "We believe in being available, present and fully engaged. Our team comes to work every day with purpose, passion and the shared mission of changing people's lives."

Why Capital Investment Services Chose LPL

The Capital Investment Services team selected LPL after a rigorous due-diligence process for its flexibility, independence, advanced technology and cultural alignment.

"LPL provided the best overall fit for our business," Lumpkin said. "Their technologically sound platform supports the trading and planning capabilities we need, while their culture — rooted in genuine relationships and advisor-focused support — truly stood out. LPL gave us the flexibility to build a structure that benefits our clients and our team, and the people at LPL made all the difference in helping us craft a path forward."

The Capital Investment Services team also includes: Kirstin Caraway, Relationship Manager; Alicia Hensley, Client Services Associate; Camren Russell, Client Services Associate; Sam Yates, Client Services Associate; and Sandra Gay, Relationship Manager.

Chief Growth Officer Marc Cohen, said, "We are happy to welcome Bobby and the entire Capital Investment Services team to LPL. Their deeply relational, client-first approach aligns closely with LPL's purpose to empower advisors with the technology, flexibility and support they need to deliver personalized advice to clients. We look forward to supporting their continued growth as they make a positive impact on the families and business owners 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 more than 32,000 financial advisors and the wealth management practices of approximately 1,100 financial institutions, servicing and custodialing approximately \$2.3 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 <http://www.lpl.com/>.

Securities and advisory services offered through LPL Financial LLC ("LPL Financial"), a registered investment adviser and broker-dealer. Member FINRA/SIPC. Capital Investment Services 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.*

*** Forbes Best-in-State Wealth Advisors ranking was developed by SHOOK Research and is based on in-person, virtual and telephone due diligence meetings and a ranking algorithm that includes: a measure of each team's best practices, client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including: assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. SHOOK's research and rankings provide opinions intended to help investors choose the right financial advisor and team, and are not indicative of future performance or representative of any one client's experience. Past performance is not an indication of future results. Neither Forbes nor SHOOK Research receive compensation in exchange for placement on the rankings, but awardees have the option to purchase rights to use the award logo or additional marketing packages to promote their award. For more information, please see www.SHOOKresearch.com. SHOOK is a registered trademark of SHOOK Research, LLC.*

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