Davis Executive Wealth Joins LPL Strategic Wealth

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SAN DIEGO, May 19, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that the financial advisors of Davis Executive Wealth have joined LPL Financial's supported independence model, LPL Strategic Wealth. The team reported serving approximately $635 million in advisory assets* and joins LPL from Steward Partners.

Based outside of Boston in Norwell, Mass., Davis Executive Wealth is led by Timothy Davis, CFP®, senior managing partner. The team also includes managing partners Michaelyn Bortolotti and Michael Carilli, along with Edward Neibert and Henry Brown, who support the firm's client service and operations.

Davis Executive Wealth serves a national client base of c-suite executives, entrepreneurs, business owners and high-net-worth families, with a strong presence up and down the East Coast, Houston, Denver and Chicago markets. The firm focuses on high-net-worth and ultra-high-net-worth families, delivering comprehensive financial planning and investment planning strategies designed to address complex tax, estate, liquidity and generational planning needs.

"At Davis Executive Wealth, everything we do is rooted in delivering on our promises and holding ourselves to the highest standards of service," said Davis. "Our clients expect thoughtful planning, disciplined investment strategies and a team that follows through. That commitment — what we call the Davis Difference — is central to how we serve families and help them manage preserve and ultimately transfer their wealth."

The Davis Executive Wealth team takes a planning-led approach centered on investment management and informed by each client's broader financial plan. The firm works closely with clients' accountants and attorneys to help address sophisticated estate and tax considerations while maintaining a strong focus on capital preservation, long-term growth and multigenerational planning.

Why They Chose LPL Strategic Wealth

The team selected LPL Strategic Wealth for its enhanced service model designed to support advisors who serve complex, high-net-worth clients. Strategic Wealth combines the freedom and flexibility of entrepreneurship with hands-on business services and dedicated support to help practices thrive both operationally and strategically.

"Strategic Wealth was the clear differentiator," Davis said. "It offers an enhanced level of support that aligns directly with the needs of our clients and the direction of our firm. The model provides a competitive advantage in how we deliver sophisticated planning solutions, particularly around tax and estate considerations, while allowing us to remain focused on our clients and the continued growth of our business."

In addition to having access to LPL's comprehensive wealth management platform and sophisticated resources, Strategic Wealth advisors benefit from an integrated service that includes simplified pricing, technology and dedicated support to launch their practice. After the transition is complete, Strategic Wealth teams receive ongoing operations support managed by a team of experienced professionals, including a business strategist, marketing partner, CFO and administrative assistant. Advisors have one point of contact, a dedicated team and priority access to advocacy and project management for complex business issues, ultimately allowing them to stay focused on the enduring needs of their clients and the culture and evolution of their practice.

"We're proud to welcome Davis Executive Wealth to LPL," said Marc Cohen, chief growth officer at LPL Financial. "Tim and his team have built a highly disciplined, client-first practice serving complex investors with sophisticated needs. LPL Strategic Wealth was designed specifically for firms like Davis Executive — providing the depth of support, resources and flexibility advisors need to deliver meaningful value and grow with confidence."

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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 custodying 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 www.lpl.com.

Securities and advisory services offered through LPL Financial LLC ("LPL Financial"), a registered investment advisor

and broker-dealer, member FINRA/SIPC. Davis Executive Wealth 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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