LPL Financial Welcomes Cebert Wealth Advisors

May 20, 2026

SAN DIEGO, May 20, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that the financial advisors of Cebert Wealth Advisors have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. The team reported serving approximately $1 billion in advisory, brokerage and retirement plan assets* and joins LPL from Ameriprise.

Based in Central Florida, Cebert Wealth Advisors focuses on serving the specialized financial needs of individuals and families living in The Villages, one of the nation's largest and fastest-growing retirement communities. The firm works primarily with retirees, pre-retirees and multigenerational families seeking guidance on managing, preserving and transferring wealth through retirement.

Led by founder and president Dale Cebert, ChFC®, CLU®, CASL®, the Cebert team includes Alec Thomas, Catherine Harris, CRPC™, APMA®, Tom Romanac, APMA®, CRPC™, Stephen Peterson, APMA®, David DeSantis, APMA® and Mark Dickerson CFP®, ChFC®, CDFA®. Together, the advisors support more than 1,700 clients, the vast majority of whom are retired or nearing retirement.

"The Villages is a community filled with people who have worked hard, built meaningful careers and are now focused on enjoying retirement while protecting what they've built," said Cebert. "Our role is to help clients navigate that transition with confidence by providing thoughtful, personalized strategies that support sustainable income, long-term financial freedom and legacy planning."

Cebert Wealth Advisors differentiates itself through a collaborative, team-based approach in which multiple professionals work together on client relationships. This structure provides broader expertise, continuity of service and more comprehensive planning — creating a stable and consistent advisory experience over time.

"We emphasize long-term relationships over transactions," Cebert added. "Many of our clients introduce their children to our firm, allowing us to support multiple generations within the same family. It's incredibly meaningful work, and it's central to who we are as a practice."

Why Cebert Wealth Advisors Chose LPL

The Cebert Wealth team selected LPL Financial for its independence, robust research capabilities and access to a broad range of investment tools and technology designed to enhance advisor efficiency and client outcomes. The advisor team is supported by Amanda Christensen, Briana Scovack, Martha Moss, Heather Widmann, Justin Rosasco, Julie Thomas, Amanda Griffor, Angela Blansett, Shelby Cebert, Debbie Jordan and Tori Thomas.

"Joining LPL gives us the flexibility to remain independent while expanding the resources we can deliver to our clients," Cebert said. "Access to broader investment solutions, research and technology allows us to continue providing sophisticated, personalized advice tailored to the unique goals of each family we serve."

Marc Cohen, chief growth officer at LPL Financial, said, "We're pleased to welcome Cebert Wealth Advisors to LPL. Dale and his team have built a deeply valued practice rooted in long-term relationships, local expertise and a strong understanding of retirees' needs. Their collaborative culture and commitment to personalized planning align well with our purpose to empower advisors with the independence, technology and support they need to serve clients 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.

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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