LPL Financial

LPL Financial Welcomes Soundview Wealth Management, LLC

May 27, 2026

SAN DIEGO, May 27, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Michael Stevenson, David Johnson and Nikko Gronhovd, CFP® of Soundview Wealth Management, LLC, have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. They reported serving approximately $600 million in advisory, brokerage and retirement plan assets* and join LPL from D.A. Davidson.

The team serves a diverse client base that spans multiple generations, working with individuals and families at all stages of their financial lives. From helping families navigate wealth transitions to guiding younger clients as they begin investing, the team is committed to building long-term relationships grounded in trust and personalized service.

"We are different because of our relationships with clients and how our team works together," said Johnson. "On the client side, we've been fortunate to be part of a practice where many relationships span generations, allowing us to work with families across all stages of life. On our side, it's a true team approach. We challenge each other, talk things through and make decisions together with the client in mind."

Soundview Wealth Management takes a comprehensive, planning-focused approach to advice. The advisors emphasize understanding each client's unique goals and circumstances while helping them filter through market noise and stay focused on long-term priorities.

"Our role goes beyond selecting investments," said Gronhovd. "We're here to listen, serve as a sounding board and help clients make thoughtful, informed decisions. By focusing on what matters most for each client, we can provide clarity and confidence throughout their financial journey."

Why Soundview Wealth Management, LLC Chose LPL

The Soundview team chose LPL after exploring opportunities to enhance their technology and operational flexibility. They were drawn to LPL's integrated platform, transparent approach and ability to support their client-first philosophy.

"When the opportunity to explore LPL came up, it felt worth a closer look," said Stevenson. "From the start, LPL's approach was straightforward. They walked us through their technology, the flexibility of the platform and how it supports the way we want to work with clients. Just as important, they outlined a transition plan that felt clear and manageable for the people we serve."

Marc Cohen, chief growth officer at LPL, said, "We are pleased to welcome the Soundview Wealth Management team to LPL. Their collaborative approach and commitment to serving clients across generations align with LPL's purpose to empower advisors with the flexibility, technology and support they need to deliver personalized advice and grow their 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 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 http://www.lpl.com/.

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

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