LPL Financial

LPL Financial Welcomes Align Private Wealth

Jun 4, 2026

SAN DIEGO, June 04, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Scott Gilliam, CFP® and Travis Blessing, AIF®, have launched a new independent practice, Align Private Wealth, through affiliation with LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. The team reported serving approximately $2 billion in advisory plan assets* and joins LPL from PNC Private Bank.

Based in Greenwood, Ind., just outside of Indianapolis, Gilliam and Blessing bring a combined 40 years of industry experience to the new endeavor. Align Private Wealth serves high-net-worth and ultra-high-net-worth families, as well as individuals, business owners and multigenerational households seeking personalized financial guidance.

"Our goal is to build deep, long-term relationships where we truly understand every aspect of our clients' lives — not just their finances," said Gilliam. "We've intentionally designed our practice to work with a limited number of families so we can be fully embedded in their decision-making, helping them navigate everything from wealth planning to generational transitions."

The team takes a goals-based, planning first approach, working closely with each client through ongoing conversations and proactive check-ins to ensure strategies remain aligned with evolving needs.

Why They Made the Move to LPL

After a period of extensive due diligence, the Align Private Wealth team chose LPL Financial for its ability to support full independence while providing the scale and resources needed to enhance the client experience.

"Independence is incredibly important to us — we wanted the ability to build our business entirely around our clients," said Blessing. "LPL's platform gives us the flexibility, technology and support to do exactly that, while enhancing how we deliver customized planning and tax-aware strategies."

Gilliam added, "We evaluated multiple firms, but LPL stood out for its reputation and its focus on helping advisors grow businesses that are built for clients, not for a firm. That client-first mentality was critical for us as we launched Align Private Wealth."

In addition to having access to LPL's integrated wealth management platform, the team values the ability to incorporate advanced planning tools and technology to further customize strategies and deliver more holistic advice.

Marc Cohen, chief growth officer at LPL, said, "We welcome Scott, Travis and the Align Private Wealth team to the LPL community. Their commitment to building deep, personalized relationships and delivering comprehensive, goals-based guidance reflects the kind of client-first approach we are proud to support. We look forward to helping them grow their business through our bespoke high-net-worth capabilities and continue delivering meaningful outcomes for the families they serve."

Outside of the office, Gilliam enjoys coaching competitive travel baseball and spending time boating on Lake Cumberland with his wife, Sondra, and their two sons. Blessing and his wife, Cheryl, recently became empty nesters and enjoy traveling together and relaxing by the ocean.

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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/.

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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