LPL Financial

LPL Financial Welcomes Fortress Financial Planning

Jun 15, 2026

SAN DIEGO, June 15, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that the financial advisors of Fortress Financial Planning have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. Advisors Bassem Moez, CRPC® and James Darden, JD, reported serving approximately $150 million in advisory, brokerage and retirement plan assets* and join LPL from MassMutual.

Based in the Detroit metro area, Fortress Financial Planning serves a diverse client base that includes pre-retirees, retirees and professionals such as physicians and business owners. The team is focused on delivering personalized financial guidance designed to help clients make informed, confident decisions about their financial future.

Fortress Financial Planning is built on a philosophy of independent advice, transparency and education. By taking the time to understand each client's goals and circumstances, the advisors aim to simplify complex financial concepts and empower clients to take an active role in their financial decisions.

"Our approach is centered on delivering personalized, client-first financial guidance and doing what's right for the families we serve," said Moez. "We believe in educating clients so they can make informed decisions, and we strive to operate with full transparency around every recommendation. By acting as the 'CFO' while our clients remain the 'CEO' of their financial lives, we help guide them with clarity, consistency and a long-term perspective. Ultimately, we want to be part of the client's success story."

Why Fortress Financial Planning Chose LPL

The advisors selected LPL for its ability to support their commitment to independence and customized financial advice. Moez previously affiliated with LPL for eight years and viewed the firm as aligned with his philosophy of providing comprehensive guidance.

"Having worked with LPL in the past, I saw firsthand that it provides the flexibility and open architecture needed to deliver financial advice in our clients' best interests," Moez said. "The platform allows us to offer a broader range of solutions and tailor our approach to each client's needs."

"For me, the move to LPL represents an opportunity to expand that independence even further," added Darden. "It gives us the ability to enhance how we serve clients and continue building a practice that prioritizes transparency, flexibility and long-term relationships."

Marc Cohen, chief growth officer at LPL, said, "We are pleased to welcome Bassem and James to LPL. Their commitment to delivering transparent, client-first advice and educating clients to make informed financial decisions aligns closely with LPL's purpose to empower advisors with the independence, technology and support they need to deliver personalized advice. We look forward to supporting their continued growth as they serve their clients and communities."

Outside the office, both advisors are actively involved in their local community. Moez serves on the board of a charter school supporting underserved and English-as-a-second-language communities, while Darden has coached high school swimming for more than two decades.

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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/.

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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