LPL Financial

# LPL Financial Welcomes Spectrum Wealth Strategies

Jun 16, 2026

SAN DIEGO, June 16, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that the financial advisors of Spectrum Wealth Strategies have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. The team reported serving approximately $1.5 billion in advisory, brokerage and retirement plan assets* and joins LPL from MassMutual.

Based in Dallas, Spectrum Wealth Strategies is led by financial advisors Randy Black, CFP®; Jonathan Bomar, CFP®; Truman Blocker, CFP®; Landon Vaughan; Weston Poulos, CFP®; Billy Geiler, CFP®; Jeff Cummins, CFP®, CPA, MBA; and Jaime Galvan, CFP®. The team also includes associate advisors Stephen Luna and Matthew Galvan, with additional office locations in Waco, Texas, and Wilmington, N.C.

Spectrum Wealth Strategies serves a broad and diverse client base of high-earning individuals and families, many of whom are focused on long-term financial growth and planning. The team emphasizes building enduring relationships by helping clients navigate evolving financial needs across different stages of life.

The practice is centered on a collaborative model, where advisors share resources, insights and expertise to deliver comprehensive financial planning. The team meets regularly to align on strategy and ensure they are providing the highest level of service to clients.

"Our goal is to meet clients where they are and help guide them to where they want to go," said Bomar. "We build comprehensive financial plans that evolve alongside our clients, with a focus on long-term partnership and helping them make informed decisions throughout life."

Spectrum Wealth Strategies differentiates itself through its team-based approach, enabling clients to benefit from a wide range of expertise within a single firm.

"We believe our strength lies in having someone on our team who can serve each client's unique needs," said Blocker. "Our core competency is delivering financial planning for life — supporting clients through every stage and helping them stay on track toward their goals."

**Why Spectrum Wealth Strategies Chose LPL**

The Spectrum Wealth Strategies team selected LPL for its autonomy, enhanced capabilities and advisor-focused support model.

"The move to LPL allows us greater independence and access to more robust solutions for our clients," Bomar said. "With deeper research capabilities and strong back-office support, we are better positioned to grow our business while continuing to provide personalized service."

LPL Chief Growth Officer Marc Cohen said, "We are pleased to welcome the Spectrum Wealth Strategies team to LPL. Their collaborative approach and commitment to delivering personalized, long-term financial planning align closely with LPL's purpose to empower advisors with the flexibility, technology and support they need to serve their clients 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 www.lpl.com/.

our website.

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

**Media Contact:**
Media.relations@LPLFinancial.com

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