LPL Financial Welcomes Tribute Financial

Jun 24, 2026

SAN DIEGO, June 24, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that the financial advisors of Tribute Financial have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. Led by president and chief executive officer, Kevin Daniels, MBAF, the team reported serving over $500 million in advisory, brokerage and retirement plan assets* and joins LPL from United Planners Financial Services.

Based across offices in Missouri and Connecticut, Tribute Financial is a family-oriented practice serving a diverse client base that spans generations and financial backgrounds. Daniels and his team focus on building long-standing relationships grounded in trust and work with clients at various stages of their financial journeys.

With a career that began in electrical engineering — including designing power systems for F-18 aircraft — Daniels brings a dynamic, analytical perspective to financial planning. Over time, he transitioned into wealth management with a commitment to helping clients navigate complex financial decisions and work towards achieving long-term financial success.

Daniels describes his approach as centered on integrity and transparency, emphasizing the importance of earning trust in an increasingly complex financial landscape. By prioritizing consistent service and accountability — including a disciplined process where multiple team members review client accounts — Tribute Financial strives to deliver a reliable and personalized client experience.

"We believe success comes from doing the right thing over and over again," Daniels said. "Our goal is to put people first and serve as trusted partners to our clients, helping them make informed decisions with confidence."

Why Tribute Financial Chose LPL

Tribute Financial chose LPL for its advanced technology, robust resources and comprehensive support designed to help advisors operate more efficiently and better serve their clients. The firm was particularly drawn to LPL's forward-looking approach and its commitment to providing cutting-edge tools that enable advisors to stay ahead in a rapidly evolving industry.

"LPL offers the technology and support we need to continue evolving our business while staying focused on what matters most — our clients," Daniels said. "Having access to enhanced resources allows our team to strengthen our capabilities and position our firm for the future."

The Tribute Financial team includes advisors Martin Nadeau, CFP®, Zach Daniels, Scott Kearns and Caleb Sanders along with a dedicated support staff committed to delivering high-quality client service.

The team is also committed to giving back, including funding the construction of schools in Nicaragua that support approximately 200 children — an extension of the firm's values-driven mission.

Marc Cohen, chief growth officer at LPL, said, "We are proud to welcome Kevin Daniels and the Tribute Financial team to LPL. They have built a thoughtful, values-driven practice rooted in trust, consistency, and a deep commitment to doing right by clients. Their holistic approach and long-standing focus on building enduring relationships make them a strong fit for LPL, and we look forward to supporting their next chapter."

Related

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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/.

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.*

Media Contact:
Media.relations@LPLFinancial.com

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