LPL Financial

LPL Welcomes McCormick Private Wealth to Linsco

Jun 30, 2026

SAN DIEGO, June 30, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Wayne McCormick, CFP®, CHFC® has joined Linsco by LPL Financial to launch McCormick Private Wealth. He reported serving approximately $340 million in advisory, brokerage and retirement plan assets* and joins LPL from Steward Partners.

Based in Manchester, N.H., the McCormick Private Wealth team also includes Michelle Lauder, CFP® and Bo Denniston. They serve individuals and families navigating some of life's most important financial decisions, including those approaching or living in retirement. The practice also supports multigenerational relationships, working with clients who are building wealth, growing their families, and planning for long-term financial responsibility and legacy.

McCormick brings 30 years of financial services experience, with a background in lending, credit, retirement planning, and insurance, and has spent the past 16 years helping clients as a financial advisor. His approach is rooted in a belief that financial advice should be both highly personal and grounded in long-term relationships.

"At the center of our work is trust," McCormick said. "When clients choose to work with us, they are placing confidence in the guidance we provide, and we take that responsibility seriously. Our role is to simplify complexity, provide meaningful insight and help clients make thoughtful decisions that align with what matters most to them."

As a planning-first practice, McCormick Private Wealth is focused on understanding each client's goals, concerns and vision for the future before developing tailored strategies to support them. The firm emphasizes clarity and relevance, helping clients navigate an increasingly complex financial landscape with confidence and purpose.

Why McCormick Private Wealth Chose LPL

After an extensive due diligence process, McCormick selected LPL for its combination of independence, integrated technology and institutional support.

"What stood out was the ability to combine a seamless technology experience with the flexibility to choose the solutions that best serve our clients," McCormick said. "That efficiency allows us to spend more time focused on relationships and planning, while maintaining the independence of a boutique practice backed by the resources of an industry leader."

LPL Chief Growth Officer Marc Cohen said, "We are pleased to support Wayne McCormick as he launches his independent practice with our Linsco model. His commitment to building trusted relationships and delivering thoughtful, planning-focused advice aligns with LPL's purpose to support advisors with the technology, resources and flexibility they need to serve clients effectively. We look forward to supporting his continued success."

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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.

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

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