LPL Financial Welcomes Advisor David Logsdon

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SAN DIEGO, July 07, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that David Logsdon has joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. Logsdon reported serving approximately $380 million in advisory, brokerage and retirement plan assets* and joins LPL from Wells Fargo Advisors.

Based in the Sun Valley, Idaho area, Logsdon is the founder of Summit Ridge Financial Advisors and brings 30 years of industry experience serving individuals, families, nonprofit organizations and small businesses across the country. Throughout his career, he has built his business on the belief that financial advice should be as unique as the families he serves, with a focus on understanding each client's full financial picture and evolving priorities.

The team also includes Wealth Management Client Associate Cecilia Moran. Their clients are often sophisticated investors with complex financial needs, including advanced estate planning considerations, and span more than a dozen states.

The practice is built on a comprehensive, full balance sheet approach that emphasizes transparency and a complete understanding of each client's financial life. By translating complex objectives into personalized strategies, Logsdon aims to deliver tailored solutions that not only address today's needs but also help preserve and manage clients' long-term prosperity.

"I've always believed that effective wealth management starts with gaining a full understanding of a client's financial picture and translating that into strategies that align with their goals," Logsdon said. "By taking a comprehensive approach and focusing on each client's unique situation, I'm able to deliver tailored guidance that evolves alongside their needs and supports their long-term journey."

Why David Logsdon Chose LPL

Logsdon selected LPL for its robust technology, expanded resources and commitment to independence, which he believes will enhance his ability to serve clients with increasingly complex needs.

"In today's rapidly evolving wealth management landscape, it's critical to partner with a firm that can deliver advanced technology, resources and comprehensive guidance," Logsdon said. "LPL's scale, combined with its commitment to independence and open architecture, ensures I can provide personalized advice while leveraging sophisticated tools and specialized expertise. Their continued investment in technology, cybersecurity and innovation further enhances my ability to deliver comprehensive and highly personalized strategies for my clients."

Marc Cohen, chief growth officer at LPL Financial, said, "We're thrilled to welcome David to LPL. With 30 years of experience and a deep commitment to understanding each client's full financial picture, David exemplifies the kind of comprehensive, client-first advice that LPL was built to support. We're excited to help him build on that foundation as he grows his practice."

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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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