LPL Financial

LPL Financial Welcomes Buell Wealth Management

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SAN DIEGO, July 15, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that the financial advisors of Buell Wealth Management have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. The team reported serving approximately $370 million in advisory, brokerage and retirement plan assets* and joins from Buell Securities Corporation.

Based in Glastonbury, Conn., Buell Wealth Management is led by Chief Executive Officer Chris Berris, who has more than 40 years of industry experience and has served in his leadership role since 1997. His former advisory practice, Buell Securities Corporation, had deep roots dating back to 1921. The five advisors of Buell Wealth Management have 187 years of combined experience and an average of 37 years in the industry.

They have now made the move to join LPL under Buell Wealth Management, where they will continue to serve a diverse client base that includes high-net-worth individuals, retirees and business owners across 21 states.

The practice operates with a collaborative team model, drawing on the group's extensive tenure and varied experience — including backgrounds at major wirehouses — to provide insights across market sectors and evolving economic conditions. Advisors regularly share knowledge and perspectives to help ensure clients receive comprehensive, well-informed guidance.

"Our approach has always been rooted in listening first and building relationships that last over time," Berris said. "We take the time to understand each client's full financial picture and provide personalized guidance that evolves with their needs, helping them work toward their goals with confidence."

Why Buell Wealth Management Chose LPL

Buell Wealth Management selected LPL for its robust operational infrastructure, enhanced capabilities and comprehensive support model.

"We've spent several years evaluating the right long-term solution for our business and our clients," Berris said. "LPL offers the services, technology and operational support we need to help streamline our business and focus more of our time and energy on serving clients. With LPL handling areas like compliance and back-office operations, we're well positioned to continue delivering the high level of service our clients expect."

LPL Chief Growth Officer Marc Cohen said, "We are pleased to welcome Buell Wealth Management to LPL. With a legacy spanning more than a century and a team defined by deep experience and long-standing client relationships, they bring a strong commitment to delivering personalized guidance and multigenerational planning. We look forward to supporting their continued growth with the flexibility, resources and support they need to serve their clients and evolve their business."

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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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