LPL Welcomes John and Brian Bizjack to Ascendus Financial Advisors

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SAN DIEGO, July 21, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors John Bizjack and Brian Bizjack have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform, aligned with Ascendus Financial Advisors, an existing firm supporting LPL-affiliated advisors. They reported serving approximately $145 million in advisory, brokerage and retirement plan assets* and join LPL from Morgan Stanley.

Based in Tulsa, Okla., they operate a family-owned practice, with brothers John and Brian continuing in the path of their father Paul, who served as a financial advisor for 40 years. Their client base consists of families and individuals nearing or in retirement, as well as young clients looking to start saving and investing. The Bizjacks have known and served many of their clients across generations.

The team is focused on listening first to understand their clients' goals and working collaboratively to ensure clients receive thoughtful and personalized guidance. Their philosophy is rooted in openness and transparency, taking their time to explain complex financial concepts in a clear, accessible way.

"Our approach is to sit down, get to know our clients and answer all their questions," said Brian Bizjack. "We want them to feel comfortable and confident in their decisions, and we work with them to build custom strategies that are realistic and make sense with their needs."

Why the Bizjacks Chose LPL and Ascendus Financial Advisors

After a period of extensive due diligence, John and Brian selected LPL and aligned with Ascendus Financial Advisors for access to a platform that empowers advisors and enhances the client experience.

"As we evaluated our options, we spoke with advisors who had made similar moves and consistently heard positive feedback about LPL," stated John Bizjack. "We grew assured that the combination of LPL's capabilities and the team at Ascendus would enable a seamless transition."

"It became clear that LPL has built an environment that benefits both advisors and clients, allowing us to maintain the client-first approach that has been central to our practice," added Brian Bizjack.

"We're happy to welcome the Bizjack Wealth Management team to Ascendus. The Bizjacks put clients first, which is why they are such a good fit for our team. We look forward to many years of working with them," said John Harding, financial advisor at Ascendus Financial Advisors.

Marc Cohen, chief growth officer at LPL, said, "We're thrilled to welcome John and Brian Bizjack to LPL and Ascendus Financial Advisors. Their family-owned practice, deep community roots, and commitment to educating clients reflect the kind of relationship-driven business we're proud to support. We look forward to helping them build on their family's legacy while continuing to deliver personalized guidance to the clients and families they serve."

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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.*

Media Contact:
Media.relations@LPLFinancial.com

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