LPL Welcomes Advisors Frank Patton and Kimberlee Mott of PacK Financial to Balmville Wealth Group

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SAN DIEGO, July 30, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Frank Patton and Kimberlee Mott of PacK Financial have joined Balmville Wealth Group, an LPL-aligned wealth management firm, through LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platforms. They reported serving approximately $150 million in advisory, brokerage and retirement plan assets* and join from Cetera.

Based in Lexington, Ky., Patton and Mott bring a combined 45 years of industry experience, helping individuals and families prepare for and enjoy retirement. While retirement planning remains a core focus of their practice, they are known for developing multigenerational relationships that span generations. Their approach centers on helping clients make informed financial decisions while supporting the legacy they hope to leave for future generations.

The team at PacK Financial describe their philosophy as “Managing in Wealth. Mattering in Life.” They begin each client relationship by listening and understanding clients’ goals, values and vision for the future before developing personalized financial strategies designed to support those objectives. Over time, many of their client relationships have evolved into long-standing partnerships built on confidence, guidance and a shared commitment to helping families navigate life’s important transitions.

“Over the years, many of our clients have become like extended family, and we've intentionally built a community,” said Mott. “We celebrate milestones, help families through life's transitions, and often become valued partners for multiple generations. That's why we say, 'Welcome to the PacK.' It's more than a tagline—it's how we want every client to feel."

Patton and Mott also embrace a collaborative, team-based approach to wealth management. By leveraging the collective experience and expertise of their colleagues, they strive to provide comprehensive planning and consistent service while ensuring every client feels supported and well-positioned for the future.

Why They Chose LPL and Balmville Wealth Group

Patton and Mott chose to join Balmville Wealth Group and LPL Financial for access to enhanced technology, expanded resources and a platform designed to support the long-term growth of their practice while allowing them to remain focused on delivering personalized service to clients.

“This move is about investing in our future so we can better serve our clients’ futures,” said Patton. “As our practice has grown, we wanted a partner that could grow alongside us. Now we have access to the scale, technology and support that can help us continue delivering the high level of service our clients deserve. These enhanced resources allow us to spend even more time building relationships and developing thoughtful financial strategies for the families we serve.”

“For us, success has always been measured by the relationships we build and the meaningful impact we make in our clients’ lives,” Mott added. “This next step strengthens our ability to work more effectively as a team and serve families with the personalized guidance they’ve come to expect while providing additional resources to support them for generations to come.”

Michael Vela, chairman and founder of Balmville Wealth Group, said, “Kim and Frank are professional, organized, intelligent and caring financial professionals who have served their clients for decades. I am excited to welcome them to Balmville Wealth Group and LPL Financial.”

“Frank and Kim’s practice is a powerful example of how relationship-driven advice can evolve and scale without losing its personal touch,” said Marc Cohen, chief growth officer at LPL Financial. “They have earned the confidence of families across generations by combining thoughtful planning with genuine care, and their decision to join Balmville Wealth Group and LPL positions them to expand that impact with enhanced resources, technology, and support. We’re proud to welcome them and look forward to helping power their next stage of growth.”

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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/.

Securities and advisory services offered through LPL Financial LLC ("LPL Financial"), a registered investment adviser and broker-dealer. Member FINRA/SIPC. PacK Financial, Balmville Wealth Management and LPL Financial are separate entities.

Throughout this communication, the terms "financial advisors" and "advisors" are used to refer to registered representatives and/or investment advisor representatives affiliated with LPL Financial.

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.*

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