



WestKai Private Wealth Joins LPL Strategic Wealth

Aug 5, 2026

SAN DIEGO, Aug. 05, 2026 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisor Don A. Harrell, CFP® of [WestKai Private Wealth](#) has joined LPL Financial's supported independence model, LPL Strategic Wealth. Harrell's team reported serving approximately \$400 million in advisory, brokerage and retirement plan assets* and joins LPL from Morgan Stanley.

Based in San Clemente, Calif., WestKai Private Wealth was founded by Harrell, who serves as CEO and private wealth manager. The team also includes Private Wealth Advisor Blake Davidson and Client Services Manager Cate Harrell. They serve individuals and families, pre-retirees and retirees, corporate executives, entrepreneurs, business owners and professional athletes. WestKai Private Wealth helps clients navigate life's financial decisions through comprehensive planning and personalized wealth management.

Harrell founded WestKai Private Wealth to better serve the clients he has grown close to over the years, seeking greater independence, expanded resources and the ability to deliver an even more personalized client experience. The firm is built around a relationship-first philosophy centered on helping clients make thoughtful financial decisions that support their families, goals and legacies.

"We believe the best financial relationships are built over time through trust, communication and genuine care," said Harrell. "Our clients deserve a team that is fully invested in understanding their lives and serving as a resource for every important financial decision. Launching WestKai Private Wealth allows us to strengthen those relationships while building a firm that reflects our values and long-term vision for serving clients."

WestKai Private Wealth provides retirement planning, account management, comprehensive financial services, estate and legacy planning, alternative investment access and lending solutions. The firm aims to be a trusted partner for clients through every stage of life, helping them coordinate complex financial matters while maintaining a clear focus on what matters most to them.

Why They Chose LPL Strategic Wealth

The team chose LPL Strategic Wealth to enhance the client experience through greater flexibility, broader access to resources and advanced technology.

"We made this move to better serve our clients," Harrell said. "LPL's technology, investment platform and commitment to advisor independence give us the flexibility to deliver more personalized advice and a broader range of solutions. We believe this partnership positions us to continue evolving alongside our clients' needs while maintaining the high standard of care they expect from us."

In addition to having access to LPL's comprehensive wealth management platform and sophisticated resources, Strategic Wealth advisors benefit from an integrated service that includes simplified pricing, technology and dedicated support to launch their practice. After the transition is complete, Strategic Wealth teams receive ongoing operations support managed by a team of experienced professionals, including a business strategist, marketing partner, CFO and administrative assistant. Advisors have one point of contact, a dedicated team and priority access to advocacy and project management for complex business issues, ultimately allowing them to stay focused on the enduring needs of their clients and the culture and evolution of their practice.

"We welcome Don, Blake and Cate to the LPL Strategic Wealth community," said Marc Cohen, chief growth officer at LPL Financial. "WestKai Private Wealth was built with a clear purpose: to give clients a more personal, connected and deeply intentional wealth management experience. Don's vision for the firm reflects the kind of entrepreneurship we're proud to support at LPL — advisors creating businesses that are true to who they are, the communities they serve and the relationships they've built over time. We look forward to helping the WestKai Private Wealth team continue bringing that vision to life in this next chapter."

WestKai Private Wealth's name reflects the firm's roots and values. "West" honors the team's connection to communities along the Pacific Coast, while "Kai," the Hawaiian word for sea, represents depth, connection and stewardship. Together, the name reflects the firm's commitment to family, community and caring for clients' wealth over the long term.

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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 custodialing approximately \$2.6 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. WestKai Private Wealth 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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