LPL Financial

LPL and Private Advisor Group Welcome Paxel Financial Consulting

Aug 6, 2026

SAN DIEGO, Aug. 06, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that the financial advisors of Paxel Financial Consulting have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform and will be leveraging Private Advisor Group's infrastructure for the next stage of their growth. Led by Founder Chin Po, CPA, the team reported serving approximately $300 million in advisory, brokerage and retirement plan assets* and joins LPL from Cetera.

Founded in 1989, Paxel Financial Consulting has built its reputation on providing comprehensive guidance that integrates financial planning, estate planning and life planning. The firm's advisors leverage their backgrounds to help clients make informed financial decisions through a coordinated and planning-efficient approach.

"We believe the best financial advice begins with understanding the complete picture of a client's life," said Po. "By combining financial planning and estate planning, we help clients pursue their goals with greater confidence and clarity. For many of the families we serve, especially those navigating the challenges of immigration and cross-border financial complexities, having an advisor who understands their unique circumstances can make a meaningful difference in their lives."

The Paxel Financial Consulting team also includes financial advisors Young Po, Harry Lee, CPA, Jim Xu, CPA, and Gary Jiang, CPA. Together, the team collaborates across disciplines to provide integrated advice tailored to each client's needs and long-term goals.

Why Paxel Financial Consulting Chose LPL

Paxel Financial Consulting selected LPL to enhance the client experience through expanded technology, greater flexibility and access to a broad range of investment and business solutions. The team was especially attracted to LPL's ability to support independent advisors while allowing them to continue delivering independent, personalized guidance.

"LPL provides the flexibility, technology and resources that will help us continue elevating the value we bring to our clients," said Po. "We believe this move strengthens our ability to deliver comprehensive advice while maintaining the independence that is central to our philosophy and the relationships we've built over the years."

"The demand for holistic financial advice continues to grow, and Paxel's integrated approach is a strong example of that trend. We're thrilled to welcome the team and alongside LPL support what's next in their journey," added David Bogdanov, business development consultant from Private Advisor Group.

Marc Cohen, chief growth officer at LPL Financial, said, "We welcome Chin Po and the Paxel Financial Consulting team to LPL. For decades, they have built a valuable practice centered on comprehensive planning, deep relationships and a commitment to serving the unique needs of their clients. Their integrated approach to estate and financial planning aligns well with LPL's commitment to helping advisors deliver differentiated value, and we look forward to supporting their continued growth."

Related

Advisors, learn how LPL Financial can help take your business to the next level.

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 $2.6 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 advisor and broker-dealer, member FINRA/SIPC. Paxel Financial Consulting, Private Advisor Group and LPL Financial are separate entities.

LPL Financial does not offer tax advice or tax preparation services.

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.*

Media Contact:
Media.relations@LPLFinancial.com

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