LPL Financial

LPL Financial Welcomes Trio of Independent Texas Advisors

Sep 24, 2026

SAN DIEGO, Sept. 24, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Jon Burnett, Dan Fowler and Chad Carlile have joined LPL Financial's broker-dealer, Registered Investment Advisor (RIA) and custodial platforms. Together, the advisors reported serving approximately $430 million in advisory, brokerage and retirement plan assets* and join LPL from Raymond James.

Based throughout the Texas Panhandle and West Texas, Burnett Financial Services, Fowler Investment Services and Carlile Investment Services serve a diverse client base that includes farmers, ranchers, oil and gas professionals, business owners and multigenerational families. While each practice operates independently, the advisors have worked together for more than 14 years and share a collaborative approach to serving clients.

Meet Burnett Financial Services

Based in Amarillo, Texas, Burnett Financial Services is led by financial advisor Jon Burnett. Burnett has nearly three decades of industry experience serving individuals, families and business owners throughout the region. Some of Burnett's clients' families are now in their fourth generation of working with his team.

"We've always believed financial planning is about building relationships that last," Burnett said. "Many of our clients have become like extended family over the years, and it's incredibly rewarding to help guide multiple generations through life's milestones. Our goal is to be a trusted resource, helping clients make informed decisions and stay focused on what matters most to them."

Burnett said returning to LPL felt like a natural fit after working with the firm for many years.

"Coming back to LPL feels like a full-circle moment for us," he said. "We were already familiar with the platform, technology and support model, and we're excited to once again align our business with a firm that shares our commitment to independent guidance and putting clients first. LPL's technology, flexibility and advisor-focused culture position us well for the future."

Supporting the practice is Ryan Houk who has worked with Burnett and his clients for approximately 15 years.

Meet Fowler Investment Services

Fowler Investment Services is based in Pampa, Texas, and is led by financial advisor Dan Fowler, who has worked in financial services since 2012. While working with his clients, Fowler focuses on developing personalized strategies tailored to each client's goals and circumstances.

"We take the time to understand what is most important to our clients and then build a strategy around those priorities," Fowler said. "Whether it's preparing for retirement, navigating a business transition or planning for future generations, our goal is to provide thoughtful guidance and long-term support."

For Fowler, LPL's technology capabilities and his familiarity with the platform were significant factors in the decision to affiliate with the firm.

"LPL gives us access to the tools, investment solutions and operational support we need to serve clients efficiently and effectively," Fowler said. "We're already familiar with the platform, and we believe the firm's ongoing investment in technology and advisor resources will benefit both our practice and our clients for years to come."

Meet Carlile Investment Services

Based in Lubbock, Texas, Carlile Investment Services is led by financial advisor Chad Carlile who has more than two decades of industry experience serving clients across West Texas. His approach centers on building long-term relationships with clients and helping them navigate complex financial decisions with clarity and confidence.

"Our clients value having an experienced partner who understands their goals, their families and the unique circumstances they face," Carlile said. "We focus on creating personalized strategies and being there for clients through every stage of life, helping them make informed decisions and feel confident about their future."

Carlile cited LPL's transition support, technology and familiarity as key drivers behind the move.

"There was a high level of trust because we knew the platform and the people behind it," Carlile said. "The transition team has been exceptional, and the entire process reinforced that we were making the right decision. LPL provides the resources, support and flexibility we were looking for, and we're excited about what lies ahead."

Supporting the practice is Cyan Batchelor who has worked alongside Carlile and his clients for approximately 20 years.

Marc Cohen, chief growth officer at LPL Financial, said, "Building an enduring business requires adaptability, long-term vision and a commitment to continually evolving alongside clients' needs. Jon, Dan, and Chad have each built firms with strong reputations across Texas, earning the confidence of the communities they serve along the way. We are honored they selected LPL as a partner for their next chapter and look forward to supporting their continued growth and success."

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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 $2.6 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. Burnett Financial Services, Fowler Investment Services and Carlile Investment Services 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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