



LPL Financial Welcomes Praxis Financial Partners

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SAN DIEGO, Oct. 05, 2026 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that [Praxis Financial Partners](#) advisors Scott Christian, CFP®, Cecil Loyd, CIMA®, Jay Gentry, CIMA® and Matt Dion have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. The team reported serving approximately \$1.1 billion in advisory, brokerage and retirement plan assets* and joins LPL from Wells Fargo Advisors Financial Network.

Based in Alpharetta, Ga., Praxis Financial Partners is a planning-focused wealth management practice serving business owners, corporate retirees, successful executives and multigenerational families across 24 states. The firm traces its roots to 2013, when Christian and Loyd launched Praxis after working together for decades. The name "Praxis," derived from the Greek word for "process," reflects the team's planning-based philosophy. Gentry joined the practice in 2020 after 20 years in asset management distribution, while Dion joined in 2024 after 15 years as an advisor.

Today, the practice combines the experience of four advisors with a tenured support team that includes Jody Smith, Zac Hirschler, Ashlyn Presley, Ellen Rick, Seleena Harris and Parvathy Eashwaran. The team credits its service model as a key reason for its client retention, referral growth and longstanding multigenerational relationships.

"We've always believed that good financial advice begins with understanding what matters most to each client," Christian said. "We take the time to learn their goals, priorities and risk tolerance, then develop customized strategies supported by an ongoing review process. Every client is different, and our objective is to create solutions tailored to their unique circumstances rather than relying on a one-size-fits-all approach."

Collaboration is central to the firm's client experience. The advisors regularly work together on client strategies and maintain weekly investment committee meetings, where portfolio decisions, market developments and investment opportunities are evaluated collectively. By managing a significant portion of client assets in-house, the team provides clients with direct access to the advisors responsible for investment decisions and portfolio construction.

"The foundation of our business is service," Gentry said. "Many of our client relationships span multiple generations, and that continuity is made possible by an incredible team of professionals who care deeply about the people we serve. Our clients know they can count on the same familiar faces year after year, and that's something we are incredibly proud of."

Why Praxis Financial Partners Chose LPL

As the firm evaluated its next chapter, the advisors sought a partner that would provide greater flexibility, advanced planning capabilities and access to emerging technology.

"The financial advice landscape continues to evolve rapidly, and we wanted a partner that allows us to stay ahead of those changes," Christian said. "LPL's open architecture platform gives us the freedom to build the wealth management ecosystem we believe best serves our clients. The planning tools, flexibility and ability to create our own technology stack will help us continue delivering exceptional service while positioning the firm for future growth."

Dion added, "We were looking for a partner committed to innovation and focused on helping advisors deliver greater value. LPL's technology and resources will enable us to continue enhancing the client experience while maintaining the personalized service our clients expect."

The team also valued LPL's ability to support its long-term independence strategy. After evaluating more than a dozen firms, Praxis selected LPL because it offered the resources and scale the advisors were seeking while allowing them to maintain ownership of their business and preserve future succession and continuity options.

LPL Chief Growth Officer Marc Cohen said, "Scott, Cecil, Jay and Matt have built Praxis Financial Partners with a clear sense of purpose. Even the firm's name speaks to their disciplined, planning-first approach, and that philosophy comes through in everything from their collaborative investment process to the multigenerational relationships they've cultivated over the years. They've created a business that balances deep technical expertise with a genuine commitment to understanding what matters most to each client. We are honored they chose LPL for this next chapter and look forward to supporting Praxis Financial Partners as they continue evolving their business while staying true to the values that have driven their 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 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 advisor and broker-dealer, member FINRA/SIPC. Praxis Financial Partners 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.*

Media Contact:

Media.relations@LPLFinancial.com

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