



LPL Financial Welcomes Legacy Financial Group

Oct 7, 2026

SAN DIEGO, Oct. 07, 2026 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisor Brad Jerome of Legacy Financial Group has joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platforms. He reported serving approximately \$175 million in advisory, brokerage and retirement plan assets* and joins LPL from Osaic.

Based outside of Flint, Mich. in Burton, Legacy Financial Group serves a diverse, multigenerational client base ranging from young investors just beginning their financial journeys to retirees and clients in their nineties. The practice has built its reputation on deep, relationship-driven service, often working with multiple generations of the same family and collaborating closely with estate planning attorneys and CPAs to help clients navigate important financial decisions. Legacy Financial Group is supported by Ben McKinney, Keaton Washburn, Brooke Lince, Autumn Blackford, Lisa Blackburn and Delanie Carpenter.

At the heart of the firm's philosophy is a commitment to understanding each client's unique goals, values and aspirations before recommending financial strategies. The team views every new relationship as a mutual partnership, taking time to learn what matters most to clients and helping create personalized plans designed to support their dreams throughout every stage of life.

"We've always believed financial planning begins with understanding people, not portfolios," Jerome said. "Our clients trust us with some of the most important decisions in their lives, and we take that responsibility seriously. Whether someone is just starting to save, preparing for retirement or planning a legacy for future generations, our goal is to build meaningful relationships and provide guidance that helps turn their goals and dreams into reality."

The team maintains a highly engaged service model, offering quarterly review opportunities, educational workshops and client appreciation events throughout the year. Through ongoing financial planning and regular communication, Legacy Financial Group strives to create long-lasting relationships that extend beyond traditional investment services and support clients through life's many milestones.

Why Legacy Financial Group Chose LPL

As Legacy Financial Group evaluated its next chapter, the team sought a partner that could support its continued growth while enhancing the client experience. After conducting extensive due diligence and consulting with industry peers, the team selected LPL for its technology, investment platform and commitment to advisor support.

"We were looking for a firm that was professional, operationally strong and capable of supporting our firm's continued growth," Jerome said. "Throughout our due diligence, it became clear that LPL stands apart in the industry. The technology, investment platform and support resources give us confidence that we can continue elevating the experience we provide, while remaining focused on what matters most: serving our clients. We believe this relationship positions us to take our practice to the next level."

Marc Cohen, Chief Growth Officer at LPL Financial, said, "The Legacy Financial Group team has built a reputation for putting relationships at the center of the client experience, and that's reflected in the trust they've earned across generations of families. As they look to the future, we're excited to provide the scale, capabilities, and strategic support to help them continue growing on their terms. We welcome Brad and the entire team to the LPL community and look forward to partnering with them as they build on an already impressive foundation."

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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. Legacy Financial Group 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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