



LPL Financial Welcomes Anchor Financial Partners

Oct 29, 2026

SAN DIEGO, Oct. 29, 2026 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that the financial advisors of [Anchor Financial Partners](#) have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platforms. The team reported serving approximately \$525 million in advisory, brokerage and retirement plan assets* and joins LPL from Northwestern Mutual.

Based outside of Atlanta in Vinings, Ga., Anchor Financial Partners is led by Frank Conner, ChFC®, CLU®, RICP®**, CASL®***, Andrew Runnion, Josh Eisenberg, CFP®, Brandon Porter, CFP®, AEP®, Kyle Brooker, CFP®, and Trey Beavers. The team works with affluent and high net worth individuals and families both pre- and post-retirement, business owners, and others with specialized wealth services, tax strategies and estate planning needs.

Anchor Financial Partners was formed to provide comprehensive guidance that extends beyond investments. The firm combines disciplined investment services with retirement planning, risk management, business continuation, legacy planning and wealth transfer considerations. The firm's name reflects the team's mission of helping clients stay anchored through changing markets, major life events and the complexities of long-term financial decision-making.

"Our approach is very relationship focused," Eisenberg. "We may be working with business owners or executives, but ultimately we are working with people and their families. We want to understand what is important to them, why it is important and how we can come alongside them to help pursue those goals. That means looking beyond pie charts and dollars and cents and keeping the focus on the life they want their wealth to support."

The practice operates as one integrated team rather than separate individual books of business. While each client has a lead advisor, the partners share responsibility for client relationships and regularly draw on one another's specialties. Anchor Financial Partners has also invested in developing the next generation of advisors, with an emphasis on continuity, succession planning and long-term relationships that can extend across generations.

"Our work starts with people, not portfolios," added Runnion. "We've intentionally built a collaborative team where we can bring different perspectives and areas of expertise to the table. That gives our clients access to the strength of the entire firm and creates continuity as their needs evolve."

Why Anchor Financial Partners Chose LPL

Anchor Financial Partners selected LPL for its independence, open architecture and ability to support the firm's vision for growth. The team sought a platform that would allow it to serve clients with greater flexibility while providing the infrastructure and resources to expand organically and welcome experienced financial advisors who are preparing for retirement and seeking a thoughtful succession solution.

"We wanted the independence to serve clients the way we believe is best, supported by a platform with the scale and capabilities to help us keep building," said Porter. "LPL stood out during our due diligence for both its open architecture and the strength behind the platform. It gives us the flexibility to deepen the client experience, pursue organic growth and provide a home for advisors who want confidence that their clients will continue to be well served as they transition into retirement."

"Anchor Financial Partners has built a distinctive culture around collaboration, continuity and a genuine commitment to placing people at the center of financial planning," said Marc Cohen, chief growth officer at LPL Financial. "The partners bring complementary expertise to a shared client experience, helping families and business owners navigate important decisions while intentionally preparing the next generation of advisors to carry those relationships forward. We are honored to welcome Anchor Financial Partners to LPL and look forward to supporting the team as it grows its impact, advances its succession vision and continues serving clients with the personal guidance that defines the firm."

Anchor Financial Partners is guided by the core values of integrity, simplicity and fun. The firm also maintains a philanthropy committee that regularly reviews community organizations and nonprofit initiatives and supports people experiencing homelessness and the team's annual involvement with Street Grace.

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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. Anchor 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.*

*** RICP conferred by The American College.*

**** CASL conferred by The American College.*

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