



## LPL Welcomes Moto Wealth Partners to Linsco

Jan 27, 2026

SAN DIEGO, Jan. 27, 2026 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that wealth advisors Breanne Bovara, CPWA®, and Derrick Petry, CFA®, have joined [Linsco by LPL Financial](#) to launch [Moto Wealth Partners](#). They reported serving approximately \$2 billion for their prior firm in advisory, brokerage and retirement plan assets\* and join LPL from Fifth Third Private Bank.

Located in Cincinnati and Dayton, Ohio, Moto Wealth Partners serves high-net-worth and ultra-high-net-worth families across the country, with a strong presence anchored in those markets. Bovara and Petry bring nearly 40 years of combined industry exposure, offering clients a boutique wealth advisory experience that blends human connection with institutional rigor.

"We believe wealth is multidimensional — it impacts family, values, purpose, and legacy," said Bovara. "Your financial picture evolves with every decision, milestone and transition. That's why our approach is dynamic and proactive. We support clients through periods of change, emotional challenges, and complex decisions — whether related to business transactions, inheritance, divorce, career transitions, and more. We start with planning, identifying goals, analyzing cash flow, developing tax strategies, and structuring estates — because investments are just one piece of the puzzle. Our goal is to simplify complexity, reduce friction and create clarity so clients can make confident decisions. By combining institutional rigor with human connection, we deliver a boutique experience that feels personal yet powerful with a goal to have every strategy align with what matters most to our clients."

Bovara added, "The name 'Moto' reflects this philosophy — momentum matters. We remove friction and aim to help clients to move forward with clarity and confidence."

### Why Moto Wealth Partners Chose LPL

Seeking independence and fiduciary flexibility, the team turned to LPL for its scale, technology and resources.

"LPL provides the operational freedom and sophisticated tools we need to elevate the client experience," said Bovara. "Their platform gives us access to cutting-edge technology, integrated planning resources and a robust client engagement ecosystem. This partnership means we can focus on what matters most: delivering highly personalized, planning first strategies for our clients. With LPL's scale and support behind us, we can streamline operations, enhance efficiency, and dedicate more time to building meaningful relationships and solving complex financial challenges."

Scott Posner, managing director of business development, said, "We are thrilled to welcome Breanne and Derrick to the Linsco community. Their client-first approach and commitment to innovation aligns with LPL's mission to empower advisors with flexibility and technology to deliver exceptional value."

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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 over 32,000 financial advisors and the wealth management practices of approximately 1,100 financial institutions, servicing and custodialing approximately \$2.3 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](http://www.lpl.com).

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*\*Value approximated based on asset and holding details provided to LPL from end of year, 2024.*

### Media Contact:

[Media.relations@LPLFinancial.com](mailto:Media.relations@LPLFinancial.com)

Tracking # 852235