LPL Financial Appoints Jonathan Lewis as Managing Director, Chief Technology and Information Officer

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Greg Gates assumes new title as Group Managing Director, Chief Product and Technology Officer, reflecting breadth of LPL's product innovation and tech advancements

SAN DIEGO, Aug. 24, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC, a leading wealth management firm, today announced that Jonathan Lewis has joined the firm as managing director, chief technology and information officer. In this role, Lewis will lead key technology domains for the firm, including architecture, engineering, infrastructure and development. He will report to Greg Gates, who assumes the broader title of group managing director, chief product and technology officer.

Lewis brings more than two decades of experience leading large-scale technology organizations across the financial services industry. Most recently, he served as head of digital and trading technology for wealth management at Wells Fargo, where he led large-scale technology platforms and advanced AI-driven engineering capabilities to support advisors and clients. Prior to Wells Fargo, Lewis was head of asset management technology at J.P. Morgan.

"Jonathan is a proven technology leader with a strong track record of building, scaling and modernizing complex wealth management platforms in service of financial advisors and their clients," said Gates. "As the LPL Latitude technology experience becomes an even greater differentiator in the value we deliver to our clients, we're enhancing our leadership team to drive innovation and execution at scale. Jonathan's deep expertise across engineering, infrastructure and technology transformation will help accelerate our innovation agenda while advancing our investments in AI and platform modernization."

Lewis is based in New York City.

Jonathan Lewis

Jonathan Lewis, Managing Director, Chief Technology and Information Officer at LPL Financial

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.

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