LPL Financial

LPL Financial Welcomes Preferred Financial Group

Aug 25, 2026

SAN DIEGO, Aug. 25, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Pat Gilbert and James Gilbert of Preferred Financial Group have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platforms. The team reported serving approximately $230 million in advisory, brokerage and retirement plan assets* and joins LPL from Harbour Investments, Inc.

Based in the Battle Creek and Kalamazoo, Mich. areas, Preferred Financial Group serves clients through a relationship-driven approach rooted in accessibility, value and personal service. The father-son team has worked together since 2014, bringing a multigenerational perspective to the practice and a shared commitment to helping clients navigate important financial decisions. The team has almost 50 years of combined experience.

Preferred Financial Group serves a wide range of clients, with a focus on pre-retirees and retirees, while also helping newly married couples, young professionals and clients with IRA and college savings accounts. Their approach centers on building meaningful relationships and understanding each client beyond the numbers, allowing the team to develop personalized financial roadmaps that can adjust as life changes.

"We believe the personal relationship we build with clients is what truly sets us apart," said Pat Gilbert. "Our door is open, and we want clients to feel comfortable stopping by, calling us and knowing we are here for them. They are not just clients to us. They are people we care about, and we are grateful for the trust they continue to place in us as we begin this new chapter with LPL."

"We work with clients to identify where they want to go, then help create the roadmap to get there," James Gilbert added. "From there, we serve as a GPS along the way, helping them stay on course while understanding that life happens and sometimes detours are necessary."

Why Preferred Financial Group Chose LPL

The team selected LPL for its scale, technology and streamlined experience, which they believe will help them operate more efficiently, enhance the client experience and support the next generation of advisors as the practice continues to grow.

"As our practice has grown, it became clear that we needed a platform that could grow with us," said Pat Gilbert. "LPL's technology, ease of doing business and resources position us to serve clients more efficiently while also helping build the firm for the next generation of advisors."

James Gilbert said LPL's modern platform was an especially important factor as the financial services industry continues to evolve. "The advancements LPL has made in technology were a major factor for us," he said. "The ability to streamline processes and access more client-facing tools gives us more time to focus on what matters most: meeting with clients, serving their needs and helping them feel confident in their financial future."

Marc Cohen, chief growth officer at LPL Financial, said, "We are pleased to welcome Pat and James to LPL. Preferred Financial Group reflects the kind of deeply personal, relationship-based advice that clients value, with a team approach built on collaboration, accessibility and a genuine commitment to helping families navigate each stage of their financial lives. We look forward to supporting them with the technology, scale and resources they need to continue serving clients efficiently while positioning the practice for its next chapter of growth."

Outside of the office, Pat and James Gilbert are lifelong Michigan residents who enjoy spending time with their families and playing golf together. Pat Gilbert has been married for 39 years and has three children and nine grandchildren. James Gilbert has been married for 10 years and has one daughter.

Related

Advisors, learn how LPL Financial can help take your business to the next level.

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.

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

Tracking #1162370