LPL Welcomes ClearHaven Wealth Management to Linsco

Sep 1, 2026

SAN DIEGO, Sept. 01, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Ryan Lewis, Dan Hocking and Steve Braatz have joined Linsco by LPL Financial to launch ClearHaven Wealth Management. The team reported serving approximately $395 million in advisory, brokerage and retirement plan assets.* Lewis joins LPL from Morgan Stanley and Hocking and Braatz from RBC Wealth Management.

Based in Minnesota, ClearHaven Wealth Management serves high-net-worth individuals and families, many of whom represent multigenerational client relationships spanning decades. The team primarily works with clients who are approaching or living in retirement, helping them navigate investment management, wealth preservation and long-term financial planning. The advisors take a highly personalized approach built on accessibility, responsiveness and enduring client relationships. The practice is supported by LPL Registered Administrative Assistant Cade Nelson and administrative professional Nikki Hocking.

ClearHaven Wealth Management's roots run deep. Lewis and Braatz have known each other since childhood and have spent much of their careers working together to serve clients and grow their practices. The team also includes second-generation financial advisors who have built upon family legacies by serving clients across multiple generations.

“We've built our practice around relationships and collaboration,” said Lewis. “Many of our clients are families we've worked with across multiple generations and we take seriously the responsibility of helping them pursue their financial goals. Our approach is grounded in thoughtful investment management, open communication and a commitment to putting clients' interests first.”

The team operates with a collaborative structure that combines relationship management and portfolio oversight. While maintaining a boutique feel, the advisors strive to provide a high-touch client experience designed to deliver personal attention and tailored financial guidance.

Why ClearHaven Wealth Management Chose LPL

The ClearHaven Wealth Management team selected LPL for its ability to provide advisor autonomy without the operational burden of running an independent business. The advisors were particularly attracted to LPL's technology, support resources and opportunity to build their own brand while focusing on serving clients.

“We wanted the flexibility to create our own identity and operate an autonomous practice while still having access to the resources, infrastructure and support of a leading firm,” said Hocking. “LPL provided the right balance, allowing us to focus on what we do best, serving clients, without having to manage all the responsibilities that come with owning and operating a standalone business.”

“LPL offered the best of both worlds,” Braatz added. “We wanted the flexibility to run an autonomous practice and build our own brand without taking on the administrative responsibilities that come with operating an independent business. With LPL's support, we can stay focused on serving clients while continuing to grow our practice.”

LPL Chief Growth Officer Marc Cohen said, “We are pleased to welcome ClearHaven Wealth Management to LPL Financial. The story behind ClearHaven is one of partnership, legacy, and enduring client relationships. Ryan, Dan, and Steve have built a practice rooted in value and dedicated to helping families navigate their financial futures across generations. We're proud to support them with the flexibility, resources, and capabilities to continue delivering a personalized experience while building for the future.”

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**Value approximated based on asset and holding details provided to LPL from end of year, 2025.*

Media Contact:
Media.relations@LPLFinancial.com

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