LPL Financial Welcomes Northstar Financial Advisors, LLC

Sep 10, 2026

SAN DIEGO, Sept. 10, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Jeneen Slack, CFP®, CDFA®, founder and partner of Northstar Financial Advisors, LLC, has joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. Slack reported serving more than $270 million in client assets* and joins LPL from Raymond James.

With nearly 20 years of industry experience, Slack built her practice on a belief that financial advice is most impactful when it is rooted in strong personal relationships. Initially inspired by a desire to help women feel more confident discussing and managing their finances, her approach today is centered on helping individuals and families make informed decisions about their financial futures.

Based in Danville, Calif., Slack serves a diverse clientele throughout the Bay Area, including professionals, families, retirees and individuals navigating major life transitions. As a Certified Divorce Financial Analyst (CDFA®), she specializes in helping clients understand the financial implications of divorce and supporting their long-term planning needs beyond the process itself.

"Relationships are truly at the heart of everything we do at Northstar," Slack said. "We've intentionally built a personalized service model where every member of our team knows our clients personally and understands what matters most to them. Whether we're helping someone navigate retirement, prepare a child for financial independence or make complex decisions during a divorce, our goal is to provide guidance that evolves alongside our clients' lives."

Slack, along with her business partner and fellow financial advisor Eric Slack, is supported by Kari Jeha, Jon Lee and V. John Threlkeld. Together, they bring decades of combined industry experience and a hands-on approach focused on delivering individualized service. Beyond working with clients, the practice is deeply committed to community engagement – regularly hosting educational workshops, retirement planning programs and client events designed to foster deeper connections and financial literacy.

Why Northstar Financial Advisors Chose LPL

As she looked ahead to the next chapter of her career, Slack sought a partner that would give her the flexibility to build Northstar around her vision for the future while providing the scale and resources of a leading financial services firm. She was particularly attracted to LPL's commitment to innovation, its advanced technology capabilities and the depth of support available to established advisors.

"I'm at a point in my career where I wanted a partner that is continually investing in the future of advice," Slack said. "LPL gives us the flexibility and resources to operate the way we believe is best for our clients, while providing the technology and support to help our team work more efficiently. That combination allows us to focus on what matters most — delivering thoughtful, personalized guidance and maintaining the strong relationships we've built with our clients."

Marc Cohen, Chief Growth Officer at LPL Financial, said, "What Jeneen has built at Northstar is personal by design. She and her team take the time to know their clients, helping women engage more confidently with their finances and guiding individuals and families through the decisions and transitions that shape their lives. We are honored that Jeneen chose LPL for Northstar's next chapter and look forward to helping the team extend that experience to more clients."

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About LPL Financial

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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.*

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