LPL Financial Welcomes Horizon Wealth Management Group

Sep 15, 2026

SAN DIEGO, Sept. 15, 2026 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisors Bill Wagner, CFP®, RICP®, Scott Sennett and Andrew Kocukov of Horizon Wealth Management Group have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platforms. The team reported serving approximately $385 million in advisory, brokerage and retirement plan assets* and joins LPL from Wells Fargo Advisors Financial Network.

Based in Wichita, Kan., Horizon Wealth Management Group serves clients through a comprehensive, planning-based approach focused on helping individuals and families navigate retirement with confidence. The ensemble practice combines the expertise of three partners and Operations Manager Julie Starns to deliver personalized guidance that extends beyond traditional investment management. The team's clients are primarily retirees and individuals approaching retirement, with a majority of the practice focused on helping clients manage the distribution phase of their financial lives.

At the core of the firm's philosophy is a commitment to understanding “the why behind the what" before making recommendations. Through detailed financial planning, retirement income strategies, estate planning guidance, long-term care discussions and ongoing support, the team works to help clients address both the financial and personal aspects of retirement.

"We believe successful retirement planning is about much more than managing money," Wagner said. "It's about helping people create a fulfilling life after they leave the workforce and ensuring they have a strategy in place to support the future they envision. Every recommendation starts with understanding what's important to our clients and the goals they want to accomplish. That level of planning helps us build deeper relationships and provide guidance that extends well beyond investment management."

The firm's team-based approach enables Horizon Wealth Management Group to provide specialized expertise across multiple areas of financial planning. Together, the team collaborates on estate planning and client strategy discussions, allowing them to deliver comprehensive service while remaining highly accessible to clients.

Why Horizon Wealth Management Group Chose LPL

The team selected LPL for its advanced technology, robust financial planning capabilities and dedicated service model. As Horizon Wealth Management Group evaluated potential partners, the advisors sought a platform that would enable them to operate more efficiently, enhance client service and support their planning-focused business model.

"We spent significant time researching potential partners and ultimately felt LPL was best positioned to support both our team and our clients," Wagner said. "The technology is exceptional, and the financial planning tools align closely with our approach. The dedicated service model will help us deliver an even better client experience. Having direct access to a consistent service team means faster answers, greater efficiency and more time spent where it matters most: helping families pursue their goals."

Marc Cohen, Chief Growth Officer at LPL Financial, said, “What stands out about Horizon Wealth Management Group is the team’s belief that meaningful advice begins with understanding each client’s goals, priorities, and vision for the future. Bill, Scott, and Andrew bring distinct expertise to that work, operating as one team so clients benefit from the collective experience and dedication of the entire firm. We’re honored to welcome Horizon Wealth Management Group to LPL and look forward to supporting the team as they expand their impact while preserving the valued relationships that have shaped their success.”

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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 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.

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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