LPL Financial Welcomes Cornerstone Advisors and Clear Pointe Wealth Management

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SAN DIEGO, Sept. 22, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that the financial advisors of Cornerstone Advisors and Clear Pointe Wealth Management have joined LPL Financial's broker-dealer, Registered Investment Advisor (RIA) and custodial platforms. The teams reported serving approximately $1 billion in assets* and join LPL from Northwestern Mutual.

The two Salt Lake City, Utah area-based practices share a decades-long personal and professional relationship and are preparing to operate from a shared office while maintaining their distinct business identities. Together, the teams provide comprehensive financial planning and retirement-focused wealth management services to business owners, professionals and retirees throughout the region.

Meet Cornerstone Advisors

Led by financial advisors Gardner Brown and Brian Lifferth, CFP®, Cornerstone Advisors specializes in helping individuals and business owners nearing or living in retirement navigate complex financial decisions. Brown and Lifferth, who have worked together since 2004, have built the practice around a planning-first philosophy focused on helping clients prepare for and sustain retirement.

The team emphasizes comprehensive financial planning, investment management and coordination with other professionals, helping clients address retirement income, tax planning, estate considerations and wealth transfer needs.

“Financial planning has always been at the center of our practice,” said Brown. “For more than 30 years, we've helped clients navigate the decisions that come with retirement and major life transitions. We don't just manage investments. We help clients address all the moving pieces of their financial lives and serve as a resource for them every step of the way.”

The team selected LPL for its advisor-focused culture, technology capabilities and flexibility to support future growth.

“LPL focuses on advisors so advisors can focus on clients,” said Lifferth. “The technology, investment capabilities, operational support and flexibility available through LPL position us to continue growing our practice while maintaining the personalized service our clients expect. We wanted a platform that could keep pace with the growth of our business and support where we want to go next.”

Supporting the practice are team members Lexie Sorensen, John Call III, Daniel Brown, Jennie Frey and Alexis Rowley.

Meet Clear Pointe Wealth Management

Clear Pointe Wealth Management is led by financial advisors Ron Hunt, CLU®, ChFC®, RICP®** and Jonathan Groberg, CLU®, ChFC®, CFP®, MSFS, who have worked together since 2005. The team serves clients who are preparing for retirement or living in retirement, with a particular focus on helping business owners and professionals translate thoughtful financial plans into actionable strategies.

Hunt and Groberg built their partnership around complementary skill sets, with Groberg focusing on investment research, portfolio construction and manager due diligence, while Hunt specializes in comprehensive planning and client strategy. Since joining forces, the practice has experienced significant growth and expanded its client relationships throughout the region.

“Our process starts with listening and building a comprehensive plan,” said Ron Hunt. “From there, we focus on implementation, helping ensure clients strategize and put strategies in place to support a successful retirement. It's about turning a financial plan into a practical roadmap that clients can confidently follow.”

As the practice continued to grow, the team sought a platform that would enhance efficiency and provide expanded resources for clients.

“We were looking for a partner that would give us the tools, resources and flexibility needed to serve clients at the highest level,” Hunt said. “LPL's technology, product breadth and service model will allow us to operate more efficiently and spend even more time focused on helping clients pursue their goals.”

Marc Cohen, chief growth officer at LPL Financial, said, "Cornerstone Advisors and Clear Pointe Wealth Management represent the kind of client-centric, planning-focused businesses that continue to elevate our industry. Gardner, Brian, Ron, and Jonathan have built firms with distinct identities, strong reputations, and enduring relationships. We are proud to welcome them to LPL and look forward to supporting their continued growth while helping them preserve the qualities that have contributed to their success."

Outside of the office, the advisors have deep roots throughout Utah and remain actively involved in their local communities. The advisors have lived in Utah their entire lives and have expressed their commitment to continuing to serve Utah families and businesses for years to come.

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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.

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

*** RICP conferred by The American College.*

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