



LPL Financial Welcomes Lakewood Wealth Management

Sep 30, 2026

SAN DIEGO, Sept. 30, 2026 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisors Harrison Kennard, CFP®, Charles Dobben and Justin Pandy, CFP®, of [Lakewood Wealth Management](#) have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platforms. The team reported serving approximately \$170 million in advisory, brokerage and retirement plan assets* and joins LPL from Cambridge.

Based in Ann Arbor, Mich., Lakewood Wealth Management serves successful professionals, families and retirees through a comprehensive planning approach centered on building long-term relationships. The team works with many multigenerational families, often helping grandparents, their children and grandchildren navigate important financial decisions together. Their client base also includes healthcare professionals, university faculty and student-athletes benefiting from Name, Image and Likeness (NIL) opportunities.

Founder Harrison Kennard brings nearly two decades of industry experience and leads a collaborative team alongside Charles Dobben and Justin Pandy. Together, the advisors focus on comprehensive financial planning, including tax planning, estate planning and wealth management strategies tailored to each client's unique goals and circumstances.

"We believe financial planning is about much more than investments," Kennard said. "Every client has a unique story, unique priorities and different goals. Our job is to understand what matters most to them and create a plan that helps support those objectives. Whether we're working with a family across multiple generations, a healthcare professional or a young athlete navigating newfound opportunities, we want to serve as a trusted partner through every stage of life."

Lakewood Wealth Management emphasizes personalized planning and ongoing collaboration with clients. The team works to understand each client's full financial picture before developing strategies designed to evolve alongside changing needs and life circumstances. Their planning process integrates investment management with tax and estate considerations to help clients make confident decisions about their future.

The firm operates with a team-based structure in which Kennard collaborates closely with Dobben and Pandy. Together, they combine experience, education and diverse perspectives to help clients receive thoughtful guidance and personalized service.

Why Lakewood Wealth Management Chose LPL

The advisors selected LPL for its depth of resources, advanced technology capabilities and commitment to advisor independence. As they evaluated potential partners, the team sought a platform that would enhance the client experience while providing access to specialized expertise and expanded planning resources.

"We wanted a partner that would allow us to continue operating independently while giving us access to quality technology and resources," Kennard said. "LPL's platform provides the tools and support we need to create a better overall experience for our clients. The technology, planning capabilities and access to subject matter experts across a wide range of disciplines stood out to us, and we're excited about the opportunities this move creates for both our team and the families we serve."

Marc Cohen, Chief Growth Officer at LPL Financial, said, "Lakewood Wealth Management has built a practice centered on an important principle: every client's goals, circumstances and aspirations are unique. Harrison, Charles, and Justin have distinguished themselves through thoughtful planning, personalized advice and a commitment to serving clients through every stage of life. We are honored they chose LPL and look forward to supporting their continued growth."

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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 custodialing 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.

Securities and advisory services offered through LPL Financial LLC ("LPL Financial"), a registered investment advisor and broker-dealer, member FINRA/SIPC. Lakewood Wealth Management and LPL Financial are separate entities.

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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