



Economos Private Wealth Joins LPL's Independent Advisor Network

Oct 13, 2026

SAN DIEGO, Oct. 13, 2026 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisor Nick Economos, CFP®, CPFA®, CEPA®, CRPC®, has launched [Economos Private Wealth](#) through affiliation with LPL Financial's supported independence model, [LPL Independent Advisor Network](#). He reported serving approximately \$580 million in advisory and brokerage assets** and joins LPL from Merrill Lynch.

Based outside of San Francisco in Danville, Calif., Nick Economos brings more than 25 years of industry experience serving corporate executives, business owners and multigenerational families. Following in the footsteps of his father, who founded The Economos Group at Merrill Lynch in 1994, Nick joined the business in 2000 and spent the next quarter century helping clients navigate complex financial decisions and pursue their long-term goals.

Economos Private Wealth takes a holistic approach to wealth management, serving as the "CFO for successful families." The team works closely with clients to develop strategic financial plans that help coordinate the many financial decisions that come with their careers, businesses and families. Each plan is regularly reviewed and refined as clients' circumstances and objectives evolve.

"We view our role as being the CFO for successful families. Just as a CFO helps coordinate every aspect of a company's financial life, we help clients bring all the moving pieces of their financial lives together through a coordinated strategy," Economos said. "Every family has different goals, priorities and challenges, so we start by listening and building a plan tailored to what matters most. That plan serves as a guide, but just like a GPS, the directions evolve as life changes. Our goal is to help clients move forward with confidence, knowing they have an experienced partner helping navigate the journey."

Why Economos Private Wealth Made the Move to LPL — and Why Now

Economos Private Wealth chose to affiliate with LPL Independent Advisor Network to gain greater independence while maintaining access to the scale, resources and infrastructure needed to serve sophisticated clients. Guided by a commitment to do what is best for clients, the team saw LPL as a way to gain the flexibility of independence while still accessing the scale and resources of one of the industry's largest wealth management organizations.

The practice is supported by a dedicated team that includes Heather Stickney and Tyler Economos. Each team member brings a different set of skills, allowing them to focus on what they do best while working together to provide clients with a high level of personal attention and service.

Through LPL Independent Advisor Network, advisors operate within an integrated support model that brings together a connected peer community, experienced guidance and dedicated regional teams. Advisors benefit from hands-on transition execution, growth coaching and consulting across key areas of the business, and ongoing operational, compliance and administrative support, enabling firms to move faster, operate more efficiently and grow on their own terms.

"Every major decision we make starts with one question: what is best for our clients," Economos said. "Moving to independence gives us the flexibility to tailor our approach around each family's unique needs and goals. What attracted us to LPL was the ability to combine that independence with the scale, resources and support of a leading wealth management firm. It truly offers the best of both worlds, allowing us to remain personal and relationship-driven while enhancing our ability to serve clients for generations to come."

"Nick has built Economos Private Wealth around deep relationships, comprehensive planning and a commitment to helping families navigate complex financial decisions with confidence," said Marc Cohen, LPL's Chief Growth Officer. "His 'CFO for successful families' approach reflects the kind of differentiated advice investors value today. We're excited to welcome Nick, Heather and Tyler to LPL and look forward to supporting the continued growth of their business."

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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. Economos Private Wealth 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.

**CRPC conferred by College for Financial Planning.*

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

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