LPL Financial Welcomes Contour Wealth Management, LLC

Nov 3, 2026

SAN DIEGO, Nov. 03, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq: LPLA) announced today that financial advisor Joe Borgese, CFP® of Contour Wealth Management, LLC has joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platforms. He reported serving approximately $390 million in assets* and joins LPL from Cetera.

Based outside of Philadelphia in Boyertown, Pennsylvania, Contour Wealth Management, LLC serves individuals and families through a relationship-driven, comprehensive planning approach. The practice works with educators, medical professionals, business owners and multigenerational families. In some cases they support three generations of the same family, from retirement planning to college savings for younger family members.

Joe Borgese began his financial services career in 1990, first working in banking before moving to the corporate side of the industry. The firm's name draws inspiration from contour lines on a map, reflecting the idea that each person's journey takes a different path.

Contour Wealth Management, LLC begins each client relationship by understanding individual goals and expectations, then develops an evolving plan designed with a goal to support the life the client wants to live. The team meets with clients throughout the year and adjusts plans as circumstances change. The team's approach brings together financial planning, investment planning and tax preparation, complemented by working relationships with outside professionals.

"Our clients' lives don't move in a straight line, and their financial plans shouldn't be static either," Joe Borgese said. "We start by understanding what they want their life to look like, then build a plan around those goals and continue adapting it as life changes. Our team has known many of these families for years, and in some cases across generations. That familiarity allows us to be there for the next decision, the next transition and the next step in their journey."

The practice is supported by a long-tenured team that has built deep familiarity with clients over decades. Lindsey Borgese, CFP® helps manage the office, while the team meets regularly to coordinate upcoming appointments and client needs. The team is supported by Diana C. Dugan, Enrolled Agent (EA) and administrative staff Brian Christman, Cheryl Dietz, and Karen Walla.

Why Contour Wealth Management, LLC Chose LPL

Contour Wealth Management, LLC selected LPL for its technology, operational support and advisor-focused service model. Joe Borgese also cited the opportunity to create cost efficiencies for clients as an important consideration in the move.

"The biggest consideration for me was what this move could mean for our clients," he said. "LPL's combination of technology, operational support and the team-based approach to supporting advisors gives us an opportunity to work more efficiently. Just as important, we believe this move can help us deliver value to clients while allowing our team to stay focused on the relationships we've built."

Marc Cohen, chief growth officer at LPL Financial, said, "Contour Wealth Management, LLC has built a deeply personal practice around continuity, comprehensive planning and relationships that extend across generations. Joe and his team understand that every family's path is different, and they have created an experience designed to evolve alongside clients through each stage of life. We're pleased to welcome Contour Wealth Management, LLC to LPL and look forward to supporting the team with the technology, resources and operational scale to preserve those trusted relationships while building for the future."

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

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

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