LPL Financial Welcomes FHT Advisors and Impel Wealth Management

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SAN DIEGO, Nov. 10, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that the financial professionals of FHT Advisors and Impel Wealth Management have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platforms. The practices, which will retain their separate business identities, reported serving approximately $1.15 billion in combined client assets* and join LPL from Cetera.

The two Ohio-based practices are led by longtime colleagues Brian Toma, CFP®, AIF®, CEPA®, of FHT Advisors and Jesse Hurst, CFP®, AIF®, of Impel Wealth Management. Toma and Hurst have known and worked alongside one another for 25 years, developing a collaborative relationship built on sharing ideas, best practices and opportunities while continuing to lead their respective firms independently.

Meet FHT Advisors

Led by Toma, FHT Advisors serves a diverse client base across 32 states, including professionals, medical professionals, individuals and families in their 30s and 40s, clients approaching retirement and retirees.

FHT Advisors operates as an ensemble practice, with advisors collaborating rather than working in silos. The firm's planning process is designed to bring multiple perspectives to client situations, giving families access to a team of professionals who can contribute different experience and planning styles.

“We do deep and meaningful work for our clients, and this is a new and exciting chapter for our team,” Toma said. “We’ve intentionally built FHT as an ensemble because we believe clients benefit when multiple advisors are thinking about their financial lives. LPL gives us access to the technology, resources and capabilities to build on that approach and continue elevating the client experience.”

Toma leads a team that includes financial advisors Sarah Stewart, CFP®, AIF®, Tom Drager, CFP®, AIF®, Tammy Hafner, Bruce Baker, AIF®, Bear Rupert, CWS®, AIF®, CPFA, Jonathan Goldston, Seann Schaller and financial consultant Stephen Ehrhardt. The advisors are operationally supported by Carmen Schultz, Teresa Nash, Michelle Arch, Amy Aufdenkampe, Sarah Connor, Joe Staff and Jacquelyn Schaible.

Meet Impel Wealth Management

Hurst built Impel Wealth Management with an original focus on retirement planning for corporate executives in the Akron area and has since expanded his practice into a multigenerational wealth management firm. He works alongside financial advisors Nathan Ollish, CFP®, AIF®, who serves many next-generation clients, and Irene Zurowski, CFP®, CRPS®, whose focus includes retirement plans and female executives.

A defining aspect of Impel's approach is serving multiple generations of the same family. Hurst said the firm works with dozens of families across at least two generations and more than a dozen across three generations. The team also creates its own market and financial planning content, including recurring blog posts and videos, to share its perspectives directly with clients.

“We have been blessed with an amazing team that works collaboratively, and when someone engages Impel, they get our entire firm,” Hurst said. “We also believe strongly in sharing ideas with our peers. That abundance mentality makes all of us better advisors and helps us build stronger practices for the clients and families we serve.”

Impel Wealth Management's advisory team is operationally supported by Jared DeLiberato, Holley Painter, Sarah Montgomery, Nisse Ferguson and Rachel Van Domelen.

Why FHT Advisors and Impel Wealth Management Chose LPL

FHT Advisors and Impel Wealth Management chose LPL Financial for its technology, advanced planning capabilities and growth resources, which they believe will help the teams address increasingly complex clients.

“The leadership alignment around growth and the opportunities ahead were unique and refreshing,” Hurst said. “LPL brings together technology, planning resources and services that can help us support complex client needs while giving us more opportunities to grow. We came away from the San Diego office visit excited about what we can accomplish in this next chapter.”

“For us, the decision also came back to the client experience,” Toma added. “We want clients to have access to strong technology, thoughtful planning capabilities and the resources needed to manage and support their financial lives. We believe LPL provides a platform that can help us continue doing meaningful work for clients while positioning our team for the future.”

Ken Hullings, head of advisor recruiting and executive vice president of business development at LPL Financial, said, “Brian and

Jesse have each built highly collaborative practices centered on thoughtful planning, strong relationships and a genuine commitment to helping clients and colleagues succeed. Their 25-year professional relationship and shared belief in exchanging ideas reflect the kind of community we strive to foster at LPL. We are proud to welcome FHT Advisors and Impel Wealth Management and look forward to supporting each firm with the technology, capabilities and growth resources to build on its distinct strengths and deliver an even stronger experience for clients."

Beyond their practices, Toma and Hurst share a commitment to giving back to their communities. Hurst has served on 14 community boards over the past 30 years, reflecting a longstanding belief that professional success should be accompanied by community service.

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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.

Securities and advisory services offered through LPL Financial LLC ("LPL Financial"), a registered investment advisor and broker-dealer, member FINRA/SIPC. FHT Advisors, Impel 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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