LPL Financial Welcomes SteadRock Private Wealth

Nov 11, 2026

SAN DIEGO, Nov. 11, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Nathan J. “Nate” Hershman, ChFC®, CEPA, AAMS®, CPWA® CRPC®, has joined LPL Financial’s broker-dealer and Registered Investment Advisor (RIA) platforms to launch SteadRock Private Wealth. Hershman reported serving approximately $185 million in advisory, brokerage and retirement plan assets* and joins LPL from Edward Jones.

Based in North Canton, Ohio, SteadRock Private Wealth serves families, individuals approaching or living in retirement, and business owners, including those in the manufacturing sector. The practice helps clients consider the connections among their investments, retirement plans, business interests, charitable priorities and financial legacies.

“Behind a financial plan is a person, a family and a set of decisions that matter to them,” Hershman said. “I want to understand what clients are working toward, what concerns them and what they want their wealth to support before we begin discussing strategies.”

Hershman’s work combines an interest in understanding complex questions with a personal approach grounded in family, faith and integrity. For business owners, planning conversations may include preparing for a future transition, considering life after the business, and evaluating how a potential sale or succession could affect retirement, family and legacy priorities.

For families and retirees, the practice emphasizes understanding the life their financial resources are intended to support. Hershman begins with questions about clients’ circumstances, values and concerns, then helps them evaluate their options and revisit their plans as their lives change. When appropriate, he coordinates with clients’ tax and legal professionals.

“A useful advisory relationship needs room for honest conversations,” Hershman said. “Sometimes that means talking through a difficult decision or looking more closely at an assumption. My role is to listen, explain the considerations clearly and help clients think about how a decision fits into the larger picture.”

Why Nate Hershman Chose LPL

Hershman selected LPL to support his decision to establish an independent practice and shape how he serves clients. Through the affiliation, SteadRock Private Wealth has access to LPL’s technology, investment platform and business support resources.

“Building SteadRock gives me the opportunity to put my approach into practice under my distinctive brand that reflects my values,” Hershman said. “LPL provides resources to support that work while I focus on developing relationships and helping clients navigate the decisions ahead.”

“Nate has built SteadRock Private Wealth around a clear commitment to understanding what matters most to each client and helping them make thoughtful financial decisions,” said Ken Hullings, head of advisor recruiting and executive vice president of business development at LPL. “We’re excited to welcome Nate to LPL and support his vision for an independent practice grounded in personal relationships, candid conversations and comprehensive planning. We look forward to helping him build on that strong foundation and grow SteadRock for years to come.”

The SteadRock name reflects steadiness and a sound foundation, connecting Hershman’s love of the outdoors with his approach to planning. Outside of work, he enjoys photography, backpacking, camping and traveling with his family.

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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. SteadRock 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.

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

Media Contact:
Media.relations@LPLFinancial.com

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