LegacyCoast Private Wealth Joins LPL Strategic Wealth

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SAN DIEGO, Nov. 12, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Brett Mower and Timothy Gallagher have launched a new independent practice, LegacyCoast Private Wealth, through affiliation with LPL Financial's supported independence model, LPL Strategic Wealth. The team reported serving approximately $480 million in assets* and joins LPL from UBS.

Based in Haddonfield, N.J., Mower and Gallagher serve individuals and families, including physicians, attorneys, entrepreneurs, small business owners and multigenerational families. Mower entered the financial industry in 1995, working in investment banking and international institutional sales before transitioning to private wealth management in 2003. Gallagher brings 16 years of industry experience and more than 25 years of financial experience to the firm.

The team takes a goals-based approach to wealth management, considering investments, tax planning, estate matters and charitable priorities within the broader context of each client's lifestyle and long-term objectives. The firm provides comprehensive financial guidance, investment services, retirement and income planning, tax and wealth strategies, estate and legacy planning, business owner and executive planning, and ongoing financial management.

"We believe great financial management begins with understanding the person, not just the portfolio," said Mower. "Our clients know we will be there when they need us and that we genuinely care about them and their families. We listen first, provide clear and straightforward advice, and go above and beyond to help clients feel confident about their financial futures. That experience is why many clients introduce their friends and family to us."

The firm's six-step process, *Discover, Analyze, Strategize, Implement, Monitor and Evolve*, is designed with a goal to help clients understand where they stand and make thoughtful financial decisions as their priorities and circumstances change. The team's five core values are clarity, relationships first, integrity, stewardship and personalization.

The name LegacyCoast Private Wealth reflects both the team's personal roots and the purpose behind its work. Having grown up along the Jersey Shore, Mower and Gallagher learned the importance of hard work and looking out for the people around them. "Coast" recognizes where their story began, while "Legacy" represents helping clients make thoughtful decisions about their wealth, the people and priorities it supports, and what they want to carry forward.

Why They Chose LPL Strategic Wealth

The team had long considered independence and determined that the time was right to take greater control of the practice and create a firm reflecting their own culture and client-service philosophy. As the practice looked to grow, the advisors wanted expanded business support, greater flexibility and access to technology and resources that could help them remain ahead of evolving client needs.

"Independence was always in the back of our minds, and we reached a point where we knew it was time to take control and build something of our own," said Gallagher. "Our clients' needs are becoming increasingly sophisticated, particularly in areas such as tax strategy and technology. We wanted a partner that could help us stay in front of those changes, grow our team, and create an experience that is even more personal and responsive. LPL gives us the scale and resources of a major firm while providing the flexibility to build our own culture and serve clients our way."

The team selected LPL Strategic Wealth for its combination of independence, technology, research, investment choice and dedicated practice support. The advisors believe the affiliation will allow them to develop more tailored strategies, expand solutions available to clients and benefit from LPL's scale while remaining focused on their client relationships.

In gaining access to LPL's comprehensive wealth management platform and sophisticated resources, Strategic Wealth advisors also receive an integrated service that includes simplified pricing, technology and dedicated support to launch their practices. Following the transition, Strategic Wealth teams receive ongoing operations support managed by experienced professionals, including a business strategist, marketing partner, CFO and administrative assistant. Advisors have one point of contact, a dedicated team and priority access to advocacy and project management for complex business issues, allowing them to remain focused on their clients and the continued evolution of their practices.

"We welcome Brett, Tim and the LegacyCoast Private Wealth team to LPL Strategic Wealth," said Ken Hullings, head of advisor recruiting and executive vice president of business development. "They have built strong client relationships by listening closely, providing candid guidance and being there when clients need them most. Their decision to launch an independent firm reflects a clear vision for the future: to create a highly personalized practice that combines genuine care with sophisticated wealth management capabilities. We are proud to support their entrepreneurial vision with the technology, resources and dedicated business support they need to grow and evolve alongside their clients."

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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 adviser and broker-dealer. Member FINRA/SIPC. LegacyCoast 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.*

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