LPL Financial Welcomes Advisor Valerie Bevan

Nov 16, 2026

SAN DIEGO, Nov. 16, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Valerie Bevan has joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platforms. Bevan reported serving approximately $315 million in advisory, brokerage and retirement plan assets* and joins LPL from MML Investors Services, a subsidiary of MassMutual.

Based in Sacramento, California, Bevan brings more than three decades of financial services experience and serves individuals, families, professionals and business owners, including many clients who are approaching or enjoying retirement. She is operationally supported by Jeanine Turner, Toni Presti-Minasian and Kirsten Steckman.

Bevan built her practice around the belief that effective financial planning begins with listening. She takes time to understand each client's goals, concerns and priorities before developing personalized strategies designed with a goal to integrate financial objectives with personal dreams and aspirations. Her work includes wealth accumulation and preservation, retirement planning, estate planning, business succession and executive compensation considerations.

"Great financial planning starts with listening," Bevan said. "Our clients want a team that understands what matters most to them and is there to help as their lives evolve. We take the time to have real conversations, develop personalized strategies and provide ongoing guidance so clients can make informed financial decisions with confidence."

The close-knit team has worked together in various roles within the financial services industry for many years. Each member brings distinct experience and strengths, while sharing a commitment to exceptional service and individual attention. The team's collaborative approach is designed to give clients access to people who know them personally and care deeply about the relationships they have built over time.

Why Valerie Bevan Chose LPL

Bevan selected LPL for its commitment to advisor independence and client-focused service, as well as its technology, resources and broad investment platform. She believes the combination will give her team greater flexibility to offer customized financial solutions while maintaining the personal attention clients expect.

“As we look to the future, we want to continue evolving while staying true to the personal approach that has always defined our practice,” Bevan said. “This move gives our team an opportunity to build on what we’ve created and continue putting our clients and their goals at the center of everything we do.”

"Valerie has built a strong business by listening closely, understanding the full picture of each client's life and delivering guidance that reflects their individual goals," said Ken Hullings, head of advisor recruiting and executive vice president of business development. "Her experienced team shares the commitment to deeply personal service, and the long-standing relationships they have developed speak to the care they bring to every interaction. We are pleased to welcome Valerie and her team to LPL and look forward to supporting them with the flexibility, technology and resources to deliver an even stronger client experience."

Bevan earned a Bachelor of Science degree in business administration with a concentration in accounting from California State University, Sacramento. A Sacramento native, she enjoys sailing, scuba diving and skiing with her husband, Barry, and their children and grandchildren.

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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.

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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