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Alec Price, C(k)P®, CPFA®, CRC® Leaves Merrill Lynch to Launch Price Financial Management on Concurrent Platform

MARLTON, NJ – Winthrop & Co. is proud to announce the launch of [Price Financial Management](#), founded by veteran advisor Alec Price, C(k)P®, CPFA®, CRC®. The new independent firm will operate on the [Concurrent Investment Advisors](#) platform, with brokerage services offered through [Purshe Kaplan Sterling Investments \(PKS\)](#).

After 14 years with Merrill Lynch and more than three decades in the financial services industry, Alec made the decision to launch his own firm in order to better serve his clients with a personalized, planning-first approach. With the backing of Concurrent’s hybrid-RIA platform, Price Financial Management gains access to leading custodians, due diligence support, compliance oversight, and operational scale—all while maintaining full independence.

“Going the extra mile for clients is never going out of my way,” Alec shared.

Known for his authentic, client-centered style, Alec has spent over 33 years helping professionals, business owners, and families build financial strategies designed for long-term success. He takes the time to understand each client’s unique goals, risk tolerance, and life priorities—then crafts tailored wealth management plans that evolve as life does.

Price Financial Management was founded with a clear mission: to deliver consistent, transparent, and collegial service at every interaction. Alec’s reputation for deep client relationships and hands-on planning reflects a philosophy that no two strategies—or clients—are the same.

Originally from Philadelphia, Alec holds a B.S. in Accounting from Drexel University and carries multiple designations, including Certified Retirement Counselor® and Certified Plan Fiduciary Advisor®. Outside of the office, he enjoys biking, golfing, and spending time with his family.

With this launch, Alec joins a growing number of experienced advisors choosing to leave the wirehouse world for a more flexible and modern platform—one that empowers them to do what they do best: serve their clients.

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