



IAPD Report

TRENT DANA BRYSON

CRD# 4079384

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When communicating online or investing with any professional, make sure you know who you're dealing with. [Imposters](#) might link to sites like BrokerCheck from [phishing](#) or similar scam websites, or through [social media](#), trying to steal your personal information or your money.

Please contact FINRA with any concerns.



IAPD Information About Representatives

IAPD offers information on all current-and many former representatives. Investors are strongly encouraged to use IAPD to check the background of representatives before deciding to conduct, or continue to conduct, business with them.

What is included in a IAPD report?

IAPD reports for individual representatives include information such as employment history, professional qualifications, disciplinary actions, criminal convictions, civil judgments and arbitration awards.

It is important to note that the information contained in an IAPD report may include pending actions or allegations that may be contested, unresolved or unproven. In the end, these actions or allegations may be resolved in favor of the representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

Where did this information come from?

The information contained in IAPD comes from the Investment Adviser Registration Depository (IARD) and FINRA's Central Registration Depository, or CRD, (see more on CRD below) and is a combination of:

- information the states require representatives and firms to submit as part of the registration and licensing process, and
- information that state regulators report regarding disciplinary actions or allegations against representatives.

How current is this information?

Generally, representatives are required to update their professional and disciplinary information in IARD within 30 days.

Need help interpreting this report?

For help understanding how to read this report, please consult NASAA's IAPD Tips page <http://www.nasaa.org/IAPD/IARReports.cfm>

What if I want to check the background of an Individual Broker or Brokerage Firm?

To check the background of an Individual Broker or Brokerage firm, you can search for the firm or individual in IAPD. If your search is successful, click on the link provided to view the available licensing and registration information in FINRA's BrokerCheck website.

Are there other resources I can use to check the background of investment professionals?

It is recommended that you learn as much as possible about an individual representative or Investment Adviser firm before deciding to work with them. Your state securities regulator can help you research individuals and certain firms doing business in your state. The contact information for state securities regulators can be found on the website of the North American Securities Administrators Association <http://www.nasaa.org>



Report Summary

TRENT DANA BRYSON (CRD# 4079384)

The report summary provides an overview of the representative's professional background and conduct. The information contained in this report has been provided by the representative, investment adviser and/or securities firms, and/or securities regulators as part of the states' investment adviser registration and licensing process. The information contained in this report was last updated by the representative, a previous employing firm, or a securities regulator on **12/26/2025**.

CURRENT EMPLOYERS

	Firm	CRD#	Registered Since
B	LPL FINANCIAL LLC	CRD# 6413	11/30/2010
IA	GLOBAL RETIREMENT PARTNERS LLC	CRD# 172011	03/22/2019

QUALIFICATIONS

This representative is currently registered in **1** SRO(s) and **28** jurisdiction(s).

Is this representative currently Inactive or Suspended with any regulator? **No**

Note: Not all jurisdictions require IAR registration or may have an exemption from registration.

Additional information including this individual's qualification examinations and professional designations is available in the Detailed Report.

REGISTRATION HISTORY

This representative was previously registered with the following firm(s):

	FIRM	CRD#	LOCATION	REGISTRATION DATES
IA	INDEPENDENT FINANCIAL PARTNERS	125112	LONG BEACH, CA	11/02/2010 - 03/22/2019
IA	LPL FINANCIAL LLC	6413	FORT MILL, SC	01/27/2011 - 02/10/2012
IA	NRP ADVISORS, INC.	141430	LONG BEACH, CA	02/04/2008 - 12/01/2010

For additional registration and employment history details as reported by the individual, refer to the Registration and Employment History section of the Detailed Report.

DISCLOSURE INFORMATION

Disclosure events include certain criminal charges and convictions, formal investigations and disciplinary actions initiated by regulators, customer disputes and arbitrations, and financial disclosures such as bankruptcies and unpaid judgments or liens.

Are there events disclosed about this representative? **Yes**

The following types of events are disclosed about this representative:

Type	Count
Customer Dispute	1



Qualifications

REGISTRATIONS

This section provides the SRO, states and U.S. territories in which the representative is currently registered and licensed, the category of each registration, and the date on which the registration becomes effective. This section also provides, for each firm with which the representative is currently employed, the address of each location where the representative works. This individual is currently registered with **28** jurisdiction(s) and 1 SRO(s) through his or her employer(s).

Employment 1 of 2

Firm Name: **LPL FINANCIAL LLC**
Main Address: 1055 LPL WAY
FORT MILL, SC 29715
Firm ID#: 6413

Regulator	Registration	Status	Date
B FINRA	General Securities Representative	Approved	11/30/2010
B Alabama	Agent	Approved	04/22/2025
B Arizona	Agent	Approved	03/02/2015
B Arkansas	Agent	Approved	09/29/2022
B California	Agent	Approved	11/30/2010
B Colorado	Agent	Approved	03/14/2023
B District of Columbia	Agent	Approved	09/06/2024
B Florida	Agent	Approved	06/15/2012
B Georgia	Agent	Approved	11/30/2010
B Idaho	Agent	Approved	02/23/2021
B Illinois	Agent	Approved	04/01/2022
B Louisiana	Agent	Approved	01/21/2011
B Maryland	Agent	Approved	08/23/2023



Qualifications

Regulator	Registration	Status	Date
B Massachusetts	Agent	Approved	11/30/2010
B Michigan	Agent	Approved	05/26/2015
B Minnesota	Agent	Approved	03/13/2025
B Montana	Agent	Approved	12/20/2022
B Nevada	Agent	Approved	03/09/2011
B New Jersey	Agent	Approved	11/30/2010
B New York	Agent	Approved	12/13/2012
B North Carolina	Agent	Approved	12/01/2010
B Ohio	Agent	Approved	06/29/2022
B Oregon	Agent	Approved	11/30/2010
B Pennsylvania	Agent	Approved	05/18/2023
B Tennessee	Agent	Approved	07/19/2024
B Texas	Agent	Approved	11/30/2010
B Utah	Agent	Approved	11/30/2010
B Washington	Agent	Approved	11/30/2010
B Wisconsin	Agent	Approved	10/11/2023

Branch Office Locations

LPL FINANCIAL LLC
 2165 E SPRING ST 4TH FLR
 LONG BEACH, CA 90806

LPL FINANCIAL LLC
 100 BAYVIEW CIR STE 4400
 NEWPORT BEACH, CA 92660

Employment 2 of 2



Qualifications

Firm Name: **GLOBAL RETIREMENT PARTNERS LLC**
Main Address: 4340 REDWOOD HIGHWAY
SUITE B-60
SAN RAFAEL, CA 94903
Firm ID#: 172011

	Regulator	Registration	Status	Date
IA	California	Investment Adviser Representative	Approved	03/22/2019
IA	Colorado	Investment Adviser Representative	Approved	03/08/2023
IA	Nevada	Investment Adviser Representative	Approved	04/03/2019
IA	New Jersey	Investment Adviser Representative	Approved	03/26/2019
IA	Texas	Investment Adviser Representative	Approved	03/22/2019
IA	Washington	Investment Adviser Representative	Approved	03/22/2019

Branch Office Locations

GLOBAL RETIREMENT PARTNERS LLC
3777 Long Beach Blvd., 5th Floor
Long Beach, CA 90807



Qualifications

PASSED INDUSTRY EXAMS

This section includes all industry exams that the representative has passed. Under limited circumstances, a representative may attain registration after receiving an exam waiver based on a combination of exams the representative has passed and qualifying work experience. Likewise a new exam requirement may be grandfathered based on a representative's specific qualifying work experience. Exam waivers and grandfathering are not included below.

This individual has passed 0 principal/supervisory exams, 2 general industry/product exams, and 1 state securities law exam.

Principal/Supervisory Exams


Exam	Category	Date
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No information reported.

General Industry/Product Exams



Exam	Category	Date
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 Securities Industry Essentials Examination (SIE)	SIE	10/01/2018
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 General Securities Representative Examination (S7)	Series 7	01/05/2000
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State Securities Law Exams

Exam	Category	Date
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  Uniform Combined State Law Examination (S66)	Series 66	02/14/2000
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PROFESSIONAL DESIGNATIONS

This section details that the representative has reported **0** professional designation(s).

No information reported.



Registration & Employment History

PREVIOUSLY REGISTERED WITH THE FOLLOWING FIRMS

This representative held registrations with the following firms:

	Registration Dates	Firm Name	ID#	Branch Location
IA	11/02/2010 - 03/22/2019	INDEPENDENT FINANCIAL PARTNERS	CRD# 125112	LONG BEACH, CA
IA	01/27/2011 - 02/10/2012	LPL FINANCIAL LLC	CRD# 6413	FORT MILL, SC
IA	02/04/2008 - 12/01/2010	NRP ADVISORS, INC.	CRD# 141430	LONG BEACH, CA
B	06/01/2007 - 11/30/2010	NRP FINANCIAL, INC.	CRD# 103717	LONG BEACH, CA
IA	06/04/2007 - 10/20/2008	NRP FINANCIAL, INC.	CRD# 103717	LONG BEACH, CA
IA	06/30/2006 - 06/15/2007	AMERITAS INVESTMENT CORP	CRD# 14869	LONG BEACH, CA
B	06/30/2006 - 06/15/2007	AMERITAS INVESTMENT CORP.	CRD# 14869	LONG BEACH, CA
IA	02/21/2001 - 06/30/2006	CARILLON INVESTMENTS, INC	CRD# 14646	LONG BEACH, CA
B	09/05/2000 - 06/30/2006	CARILLON INVESTMENTS, INC.	CRD# 14646	LONG BEACH, CA
B	01/06/2000 - 08/16/2000	MERRILL LYNCH, PIERCE, FENNER & SMITH INCORPORATED	CRD# 7691	NEW YORK, NY

EMPLOYMENT HISTORY

Below is the representative's employment history for up to the last 10 years.

Employment Dates	Employer Name	Position	Investment Related	Employer Location
03/2019 - Present	Global Retirement Partners, LLC	Investment Advisor Representative	Y	Long Beach, CA, United States
11/2010 - Present	LPL FINANCIAL LLC	REGISTERED REPRESENTATIVE	Y	LONG BEACH, CA, United States
11/2010 - 03/2019	INDEPENDENT FINANCIAL PARTNERS	INVESTMENT ADVISOR REPRESENTATIVE	Y	LONG BEACH, CA, United States



Registration & Employment History



OTHER BUSINESS ACTIVITIES

This section includes information, if any, as provided by the representative regarding other business activities the representative is currently engaged in either as a proprietor, partner, officer, director, employee, trustee, agent, or otherwise. This section does not include non-investment related activity that is exclusively charitable, civic, religious, or fraternal and is recognized as tax exempt.

1. 11/17/2010 - NON-VARIABLE INSURANCE - PROPERTY & CASUALTY - TIME SPENT 20% - LONG BEACH, CA.
2. 11/17/2010 - NON-VARIABLE INSURANCE - BRYSON AGENCY, INC. - OWNED WHOLLY BY TRENT. NO SECURITIES COMMISSIONS FLOW THROUGH THIS ENTITY. THIS COMPANY HANDLES GROUP MEDICAL SALES. - TIME SPENT 25% - LONG BEACH, CA.
3. 12/10/2010 - Bryson Wealth Management - INV REL - AT REPORTED LOCATION - DBA for LPL Business (entity for LPL business)
4. 06/06/2011 - NON-VARIABLE INSURANCE - BRYSON FINANCIAL - LIFE INSURANCE, P & C, HEALTH, GROUP MEDICAL SALES. - LONG BEACH, CA
5. 9/27/2013 - INSTRUCTOR - CALIFORNIA STATE UNIVERSITY LONG BEACH - INSTRUCTOR AT CALIFORNIA STATE UNIVERSITY LONG BEACH FOR THE HUMAN RESOURCES MANAGEMENT CERTIFICATE PROGRAM. - TIME SPENT 5% - LONG BEACH, CA.
6. 05/27/2014 - Outbreak Soccer Centers - IVN REL - Other-New Company - 5% TIE SPENT - I am joining an LLC that runs an indoor soccer center
7. 6/13/2019 - Global Retirement Partners, LLC - Investment Related - At Reported Business Location(s) - Registered Investment Advisor Hybrid - Start Date: 03/22/2019 - 160 Hours Per Month/160 Hours During Securities Trading - I provide investment advisory services through Global Retirement Partners, LLC, an independent investment advisor firm. I started this business activity in 03/22/2019. I expect to spend approximately 160 hours per month on this activity. Please see the advisory firm's Form ADV for more information about its address, the nature of its business, its owners, and its services at <http://www.adviserinfo.sec.gov/IAPD>. The firm is separate from and independent of LPL Financial.
8. 6/13/2019 - Global Retirement Partners LLC - DBA: (Hybrid) Bryson Wealth Management - Investment Related - At Reported Business Location(s) - Registered Investment Advisor DBA - Start Date: 03/22/2019 - 160 Hours Per Month/160 Hours During Securities Trading - I provide investment advisory services through Global Retirement Partners, LLC, an independent investment advisor firm. I started this business activity in 03/22/2019. I expect to spend approximately 160 hours per month on this activity. Please see the advisory firm's Form ADV for more information about its address, the nature of its business, its owners, and its services at <http://www.adviserinfo.sec.gov/IAPD>. The firm is separate from and independent of LPL Financial.
9. 4/24/2020 - Culture Works, LLC - Not Investment Related - Location/Address: N/A - For-Profit Board Member - Started 04/01/2020 - 10 Hours Per Month/2 Hours During Securities Trading - 10 Hours Per Month/0 Hours During Securities Trading - Board position and partner role in an HR company called Culture Works. They will be a fractional HR services company.
10. 1/25/2023 - Midwest Holdings - Investment Related - At Reported Business Location(s) - Real Estate Rental - Start Date - 11/17/2022 - 2 Hours Per Month/0 Hours During Securities Trading



Disclosure Summary

Disclosure Information

What you should know about reported disclosure events:

(1) Certain thresholds must be met before an event is reported to IARD, for example:

- A law enforcement agency must file formal charges before an Investment Adviser Representative is required to report a particular criminal event.;
- A customer dispute must involve allegations that an Investment Adviser Representative engaged in activity that violates certain rules or conduct governing the industry and that the activity resulted in damages of at least \$5,000.

(2) Disclosure events in IAPD reports come from different sources:

As mentioned in the "About IAPD" section on page 1 of this report, information contained in IAPD comes from Investment Adviser Representatives, firms and regulators. When more than one of these sources reports information for the same disclosure event, all versions of the event will appear in the IAPD report. The different versions will be separated by a solid line with the reporting source labeled.

(3) There are different statuses and dispositions for disclosure events:

- A disclosure event may have a status of *pending*, *on appeal*, or *final*.
 - A "pending" disclosure event involves allegations that have not been proven or formally adjudicated.
 - A disclosure event that is "on appeal" involves allegations that have been adjudicated but are currently being appealed.
 - A "final" disclosure event has been concluded and its resolution is not subject to change.
- A final disclosure event generally has a disposition of *adjudicated*, *settled* or *otherwise resolved*.
 - An "adjudicated" matter includes a disposition by (1) a court of law in a criminal or civil matter, or (2) an administrative panel in an action brought by a regulator that is contested by the party charged with some alleged wrongdoing.
 - A "settled" matter generally represents a disposition wherein the parties involved in a dispute reach an agreement to resolve the matter. Please note that Investment Adviser Representatives and firms may choose to settle customer disputes or regulatory matters for business or other reasons.
 - A "resolved" matter usually includes a disposition wherein no payment is made to the customer or there is no finding of wrongdoing on the part of the Investment Adviser Representative. Such matters generally involve customer disputes.

(4) You may wish to contact the Investment Adviser Representatives to obtain further information regarding any of the disclosure events contained in this IAPD report.



DISCLOSURE EVENT DETAILS

When evaluating this information, please keep in mind that some items may involve pending actions or allegations that may be contested and have not been resolved or proven. The event may, in the end, be withdrawn, dismissed, resolved in favor of the Investment Adviser Representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

This report provides the information exactly as it was reported to the Investment Adviser Registration Depository. Some of the specific data fields contained in the report may be blank if the information was not provided.

The following types of events are disclosed about this representative:

Type	Count
Customer Dispute	1

Customer Dispute

This section provides information regarding a customer dispute that was reported to the Investment Adviser Registration Depository (IARD) by the Investment Adviser Representative (IAR), an investment adviser and/or securities firm, and/or a securities regulator. The event may include a consumer-initiated, investment-related complaint, arbitration proceeding or civil suit that contains allegations of sales practice violations against the individual.

The customer dispute may be pending or may have resulted in a civil judgment, arbitration award, monetary settlement, closure without action, withdrawal, dismissal, denial, or other outcome.

Disclosure 1 of 1

Reporting Source:	Individual
Employing firm when activities occurred which led to the complaint:	LPL FINANCIAL LLC
Allegations:	Client alleged that advisor recommended an inappropriate fund (stable value) to the retirement plan from July 2011 to June 2023. We have closed the complaint as this was a misunderstanding that was resolved through direct discussions with the Advisor and Client.
Product Type:	No Product
Alleged Damages:	\$60,000.00
Is this an oral complaint?	No
Is this a written complaint?	Yes
Is this an arbitration/CFTC reparation or civil litigation?	No

Customer Complaint Information

Date Complaint Received:	06/13/2023
Complaint Pending?	No
Status:	Closed/No Action
Status Date:	01/09/2024

Settlement Amount:

Individual Contribution Amount:



Broker Statement

This was a misunderstanding that was resolved through direct discussions with the Advisor and Client.



End of Report

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