Unparalleled Support For Your Financial Future

Take the next step towards financial freedom

When you work with an advisor backed by LPL Financial, they'll have the tools, technology, and support to deliver personalized advice designed around what matters to you.

$1.4T
LPL services or custodies nearly $1.4 trillion in brokerage and advisory client assets[1]

8M+
Client accounts served by LPL advisors and institutions[1]

23K+
Financial Professionals serviced[1]

1,100+
Financial institutions[2] that partner with LPL[1]

FORTUNE 500
Your financial advisor is armed with the resources of a *Fortune* 500[4] firm with an entrepreneurial spirit

100%
Our cyber fraud guarantee means your assets are 100% protected[3]

99%
LPL currently retains 99% of advisors, who appreciate the autonomy, flexibility, and support they receive

Zero
Your advisor is never pushed to sell proprietary products

Learn more at LPL.com

1. Data as of May 2024
2. Banks and credit unions
3. LPL will reimburse you for 100% of realized losses in your impacted LPL accounts, which were incurred directly as a result of unauthorized access to an LPL system.
4. LPL ranked #392 on the Fortune 500 in 2024

LPL Financial

About LPL Financial

LPL Financial Holdings Inc. (Nasdaq: LPLA) was founded on the principle that the firm should work for advisors and institutions, and not the other way around. Today, LPL is a leader in the markets we serve, serving more than 23,000 financial advisors, including advisors at approximately 1,000 institutions and at approximately 580 registered investment advisor ("RIA") firms nationwide. We are steadfast in our commitment to the advisor-mediated model and the belief that Americans deserve access to personalized guidance from a financial professional. At LPL, independence means that advisors and institution leaders have the freedom they deserve to choose the business model, services, and technology resources that allow them to run a thriving business. They have the flexibility to do business their way. And they have the freedom to manage their client relationships, because they know their clients best. Simply put, we take care of our advisors and institutions, so they can take care of their clients.

*LPL is ranked the #4 custodian based on Cerulli Associates' 2022 U.S. RIA Marketplace Report; No. 1 Independent Broker-Dealer in the U.S. (Based on total revenues, *Financial Planning* magazine 1996-2024); among third-party providers of brokerage services to banks and credit unions, No. 1 in AUM Growth from Financial Institutions; No. 1 in Market Share of AUM from Financial Institutions; No. 1 in Market Share of Revenue from Financial Institutions; No. 1 on Financial Institution Market Share; No. 1 on Share of Advisors. (2021-2022 Kehrer Bielan Research & Consulting Annual TPM Report). *Fortune* 500 as of June 2024.

This material has been prepared by LPL Financial, LLC.

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