

# Dream Bigger with Proven Excellence

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.



**\$2.3T**

In brokerage and advisory assets serviced or custodied<sup>1</sup>



**8M**

Americans served by our financial advisors and institutions<sup>1</sup>



**32K+**

LPL advisors<sup>1</sup>



**1,100**

Financial institutions<sup>2</sup> that partner with LPL<sup>1</sup>

**FORTUNE  
500**

Company strength working for your advisor and you<sup>4</sup>



**100%**

Cyber Fraud Guarantee fully protects your assets<sup>3</sup>



**98%**

Advisor retention rate, advisors value the autonomy flexibility, and support LPL provides<sup>1</sup>



**Zero**

Your advisor is never pushed to sell proprietary products

1. Data as of March 31, 2026.

2. Banks, credit unions and product manufacturers that partner with LPL.

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. Please visit: [go.lpl.com/cyber-fraud.html](https://go.lpl.com/cyber-fraud.html) for terms and obligations.

4. LPL ranked #340 on the Fortune 500 in 2025.

### 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 over 32,000 financial advisors and the wealth management practices of approximately 1,100 financial institutions, servicing and custodialing approximately \$2.3 trillion in brokerage and advisory assets for 11 million client accounts. 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](http://www.lpl.com).

This material has been prepared by LPL Financial, LLC.



**ACH Investment Group, Inc.**  
**Janet Fox, MBA, CLTC**  
President  
Financial Consultant  
2840 Plaza Place  
Suite 150  
Raleigh, NC 27612  
(919) 571-3435 Office  
(919) 823-6330 Cell  
[janet\\_fox@achinvest.com](mailto:janet_fox@achinvest.com)  
[achinvest.com](http://achinvest.com)



Securities and advisory services offered through LPL Financial, a registered investment advisor, Member FINRA/SIPC. LPL Financial and ACH Investment Group, Inc. are separate entities.