

Success on Your Terms

What if you could have the scale of a fast-growing wealth manager?

To help you and your clients unlock boundless potential, LPL Financial continues to invest in infrastructure improvements and provide industry-leading capabilities. Let's power the future of advice – together.



#1

Independent broker-dealer ranking for the past 25+ years.¹



Zero

Proprietary product-selling requirements



98%

Advisor retention rate⁵



\$1.9T

In brokerage and advisory assets serviced or custodied.²



\$500M

LPL's budgeted spend on its technology infrastructure and cybersecurity for 2024.



29K+

LPL advisors²



7M

Client accounts served by LPL advisors and institutions²



1,100

Financial institutions³ that partner with LPL²

FORTUNE 500

Company strength working for you⁴

1. Based on total revenues, *Financial Planning* magazine, 1996-2024

2. Data as of June 30, 2025

3. 1,100 banks, credit unions and product manufacturers that partner with LPL

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

5. As of Q22025