LPL BY THE NUMBERS

AN INDUSTRY LEADER

1989 LPL was founded in 1989
20K+ Financial professionals served
800+ Financial institution partners
FORTUNE 500 Ranked no. 442 on the Fortune 500 List

INDEPENDENT BROKER/DEALER

#1 In the United States

MARKET SHARE

#1 among 3rd-party providers of brokerage services to banks and credit unions

RIA CUSTODIAN

#3 In the United States

LPL ACROSS AMERICA

LPL has home offices in Austin, Boston, Fort Mill, San Diego, and financial professionals located in all 50 states

SERVING & PROTECTING YOUR ASSETS

7M+ Client accounts serviced
$1T+ Brokerage and advisory client assets, serviced or custodied
24/7 Access to your account information via our mobile app and portal

DEDICATED ANNUAL BUDGET

$40M We invest in cybersecurity and data privacy to keep you and your data protected from cyberattacks

800 Risk & compliance experts provide guidance and oversight
100 Cybersecurity experts to keep you and your assets protected

PROPRIETARY LPL PRODUCTS WITH THOUSANDS OF INVESTMENT OPTIONS

Access to a breadth of investment solutions—from mutual funds to bonds to alternative investments—and fee-based investment programs that your financial professional can leverage to craft your customized portfolio

Data as of August 2, 2022

1 Fortune 500 ranks U.S. companies based on a review of the prior year’s total revenue and factors such as profits after taxes, year-end assets and total stockholders’ equity.
2 As reported by Financial Planning magazine, June 1996-2022, based on total revenue.
LPL BY THE NUMBERS

ABOUT LPL FINANCIAL:

LPL Financial (Nasdaq: LPLA) was founded on the principle that the firm should work for the advisor, and not the other way around. Today, LPL is a leader in the markets we serve,* supporting more than 20,000 financial advisors, and more than 800 institution-based investment programs and 500 independent RIA firms nationwide. We are steadfast in our commitment to the advisor-centered model and the belief that Americans deserve access to personalized guidance from a financial advisor. At LPL, independence means that advisors have the freedom they deserve to choose the business model, services, and technology resources that allow them to run their perfect practice. And they have the freedom to manage their client relationships, because they know their clients best. Simply put, we take care of our advisors, so they can take care of their clients.


This material was prepared by LPL Financial, LLC.

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