

# Success on Your Terms

## Discover the advantages of LPL Financial's size and scale

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

LPL is consistently ranked the #1 independent broker-dealer in the United States<sup>1</sup>



# Zero

You're never pushed to sell proprietary products to your clients



# 98%

Percentage of advisors who choose to stay at LPL because of the autonomy, flexibility, and support they receive



# \$1.7T

LPL services or custodies nearly 1.7T in brokerage and advisory client assets<sup>2</sup>



# \$465M

LPL's total spend on its technology infrastructure and cybersecurity for 2024, a 29% increase from 2023



# 28K+

Financial Professionals serviced<sup>2</sup>



# 10M+

Client accounts served by LPL advisors and institutions<sup>2</sup>



# 1,200+

Financial institutions<sup>3</sup> that partner with LPL<sup>2</sup>

# FORTUNE 500

You're backed by the resources of a Fortune 500 firm<sup>4</sup> with an entrepreneurial spirit

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

2. Data as of December 2024

3. Banks and credit unions

4. LPL ranked #392 on the *Fortune* 500 in 2024