LPL at a Glance

Thoughtful, balanced financial guidance is a fundamental need for everyone. We provide financial professionals and institutions the tools they need to develop meaningful, long-term client relationships. We help independent financial professionals support their clients with research, technology, compliance, access to an ever-growing array of products, continuing education, and more. Our dedicated Institution Services division focuses exclusively on the needs of financial institutions and their diverse clients.

Corporate Snapshot

1989
LPL is founded through the merger of Linsco (est. 1968) and Private Ledger (est. 1973)

$5.57B
Trailing 12-Month Gross Revenue

16,464
Financial Professionals

4,343
LPL Employees

Recognition

#1 Corporate Social Responsibility / Diversity[1]

#1 Technology[1]

Client Assets Serviced and Custodied

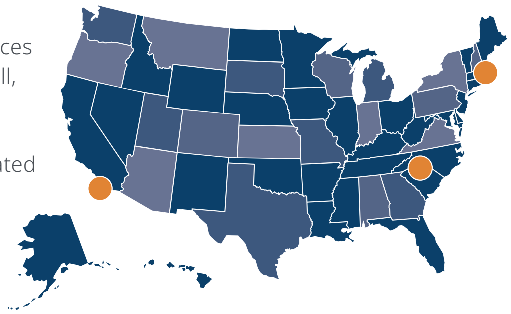
$764.4B
Total

$398.6B
Brokerage

$365.8B
Advisory

LPL Across America

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



Banks and Credit Unions

Largest provider of third-party investment services to banks and credit unions[2]

782
Financial Institution Partners

490
Banks

292
Credit Unions

These financial institution partners comprise:

$121.7B
Brokerage and Advisory Assets

2,507
Financial Professionals

$697.0M
Trailing 12-Month Gross Revenue

LPL backs the wisdom and experience of independent professionals with a catalog of services and resources, including:

- Objective market research
- Innovative technology with leading cybersecurity functionality
- Compliance oversight
- Ongoing practice consulting and training

Data as of 12/31/19
[1] Source: 2019 WealthManagement.com Industry Awards
[2] 2017/2018 Kehrer Bielan TPM Survey. Based on financial institution market share.

LPL Financial