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**ALFRED RUSSO, DANIEL ROBINSON, & AMANDA MURRAY OF
PLAN 4 FINANCIAL ARE RECOGNIZED AS THREE OF LPL
FINANCIAL'S TOP FINANCIAL ADVISORS**

Garden City, New York — February 9, 2024 – Alfred S. Russo, Daniel Robinson, & Amanda E. Murray, financial advisors at Plan 4 Financial in Garden City, today announced that their achievements have been recognized with Alfred's inclusion in LPL Financial's Masters Club for 2024, and Daniel and Amanda's inclusion in LPL Financial's Ascent Club for 2024. This distinction celebrates a select group of advisors on ambitious growth trajectories, who have achieved excellence in financial guidance. As America's investing public looks ahead to continued macroeconomic uncertainty and market volatility, it is critical they have an experienced financial partner by their side to help them manage, preserve, and deploy their wealth.

Alfred, Dan, & Amanda provide their clients comprehensive wealth management services, including but not limited to retirement and financial planning, individual money management, and investment in individual stocks and bonds, mutual funds, and annuities.

Alfred Russo attributes the group's success to their unique team approach to client relationship management. "This not only results in clients having ready access to an advisor familiar with their unique circumstances but also allows our advisors to leverage each of our individual areas of expertise to create the optimal solution for their clients."

"On behalf of the entire team at LPL, I am thrilled to congratulate Alfred, Daniel, & Amanda on their outstanding achievements in 2023," said Julian Lopez, LPL's Executive Vice President of Independent Advisor Services Relationship Management. "By utilizing our proprietary technology and suite of customized services, they have taken their business to the next level, allowing them to dedicate more time to building meaningful client relationships with families. Through their guidance, they have been instrumental in helping these families turn their aspirations into financial realities."

Alfred, Dan, and Amanda have been affiliated with LPL Financial, a leading wealth management firm, for 20, 8, & 6 years, respectively. Through LPL, financial advisors are empowered to focus

on their unique skills in building client relationships and delivering personalized financial advice, while leaning on LPL to provide the services, support, and tools to help increase operational efficiency and power business growth.

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About LPL Financial

LPL Financial Holdings Inc. (Nasdaq: LPLA) was founded on the principle that LPL should work for advisors and enterprises, and not the other way around. Today, LPL is a leader in the markets we serve, serving more than 22,000 financial advisors, including advisors at approximately 1,100 enterprises and at approximately 570 registered investment advisor (RIA) firms nationwide. We are steadfast in our commitment to the advisor-mediated model and the belief that Americans deserve access to personalized guidance from a financial professional.

At LPL, independence means that advisors and enterprise leaders have the freedom they deserve to choose the business model, services, and technology resources that allow them to run a thriving business. They have the flexibility to do business *their* way. And they have the freedom to manage their client relationships because they know their clients best. Simply put, we take care of our advisors and enterprises, so they can take care of their clients.

Securities and Advisory services offered through LPL Financial LLC (“LPL Financial”), a registered investment advisor. Member FINRA/SIPC. LPL Financial and its affiliated companies provide financial services only from the United States.

Throughout this communication, the terms “financial advisors” and “advisors” are used to refer to registered representatives and/or investment advisor representatives affiliated with LPL Financial.

We routinely disclose information that may be important to shareholders in the “[Investor Relations](#)” or “[Press Releases](#)” section of our website.

**Achievement is based on annual production among LPL-affiliated investment programs only.*