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SAN DIEGO and EL DORADO HILLS, CA - April 11, 2013 - LPL Financial, a wholly owned subsidiary of LPL Financial Holdings Inc. (NASDAQ: LPLA), and EPIC Platforms, Inc., which provides consulting services and turnkey solutions to design, build and support licensed branch employee (LBE) programs, today announced a strategic collaboration to create one of the bank and credit union industry's most comprehensive licensed branch employee (LBE) support programs.

The partnership will combine the unique capabilities of EPIC Platforms with the extensive existing LBE consulting program of the LPL Financial Institution Services business consulting team, which serves the investment sales programs for more than 700 financial institutions in 4,000 branch locations nationwide.

This enhanced LBE support program is targeted at helping increase productivity, household penetration and share-of-wallet among investment programs of financial institutions supported by LPL Financial's Institution Services business.

Rob Comfort, Executive Vice President of Business Consulting, LPL Financial Institution Services, said, "As banks and credit unions seek new ways to increase their revenues and improve profitability, they have found that investment programs offer an effective means of gaining a greater share of their customers' assets and significantly reinforcing customer loyalty. LBE programs, which train and certify select employees, have in turn proven to be a potent method of extending the reach of a wealth management program located at banks or credit unions and increasing the productivity of its dedicated financial advisors. At the same time, LBE programs are also vehicles for grooming a financial institution's next generation of financial advisors in a highly cost-efficient way."

Mr. Comfort continued, "Put simply, a comprehensive LBE program may provide another incremental means of augmenting a wealth management program at low cost and with minimal risk for each financial institution. No matter whether an institution is only considering an LBE program, has one in place that needs improvement, or already has one functioning at productive levels, the enhanced LPL Financial-EPIC LBE offering will provide valuable consulting, tools, and resources to establish a program or increase its capabilities."

The comprehensive, end-to-end LBE platform will serve the following:

- Bank and credit union executives -- to help them understand the value and opportunities presented by an LBE program and to design and implement customized programs for their institutions;
- Financial advisors and investment program managers - by providing tools and resources to be better coaches and mentors to their LBEs and staff;
- Branch employees - by providing ongoing support in training, certification and in developing them into effective licensed branch employees.

David Simula, President and CEO of EPIC Platforms, said, "We are honored to have this opportunity to work with industry powerhouse LPL Financial and look forward to helping them deliver unprecedented results for their clients and for the LPL Financial Institutions Services business unit. We are pleased that LPL Financial and EPIC are so similarly attuned to the significant opportunity that exists for financial firms to optimally utilize their licensed branch employees and we are confident that working together we will help many firms, their advisors and their clients to set and pursue their financial goals."

About EPIC Platforms
EPIC Platforms provides financial institutions with consulting services and turnkey solutions to design, build and support licensed branch employee programs and their optimal relation to full-time or dedicated financial consultants. Founded by a former member of Guaranty Bank's award-winning and nationally recognized executive investment sales management team, EPIC Platforms exists to help firms build better financial advisors. For more information, please visit www.epicplatforms.com or call 888-851-7624.

About LPL Financial
LPL Financial, a wholly owned subsidiary of LPL Financial Holdings Inc. (NASDAQ: LPLA), is the nation's largest independent broker-dealer (based on total revenues, Financial Planning magazine, June 1996-2012), a top RIA custodian, and a leading independent consultant to retirement plans. LPL Financial offers proprietary technology, comprehensive clearing and compliance services, practice management programs and training, and independent research to over 13,300 financial advisors and approximately 700 financial institutions. In addition, LPL Financial supports over 4,500 financial advisors licensed with insurance companies by providing customized clearing, advisory platforms and technology solutions. LPL Financial and its affiliates have approximately 2,900 employees with primary offices in Boston, Charlotte, and San Diego. For more information, please visit www.lpl.com.

Securities offered through LPL Financial. Member FINRA/SIPC

EPIC Platforms is not affiliated with LPL Financial

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