



Fortigent Announces Launch of Fully-Integrated Platform of Wealth Management Solutions for High-Net-Worth Space

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-- End-to-End Platform Represents Significant Step Forward for Outsourced Solutions Enabling Advisors and Institutions to Serve and Engage High-Net-Worth Clients --

-- Re-Launches Corporate Website as Online Information and Community Hub for Professionals Serving HNW Investors --

Rockville, MD - September 24, 2013 - Fortigent, LLC, a leading provider of outsourced wealth management solutions for financial advisors and institutions targeting high-net worth ("HNW") clients, today announced a significant evolution in its service offerings with the availability of its new, fully-integrated Fortigent platform. The new platform is designed to address the complex needs of HNW clients and to provide advisors and institutions with a seamless workflow that will enable them to develop, trade, execute, and report on strategies to meet their clients' needs. Fortigent's clients, consisting of financial advisors and institutions, currently manage and serve approximately \$70 billion through Fortigent's various service offerings.*

The new platform is designed to make Fortigent an attractive solution to a wider range of advisors that focus on the HNW market. It is designed to reflect and enhance the way advisors and institutions interact with their HNW clients, and has already been adopted by many of Fortigent's existing clients. The platform provides highly-specialized back- and middle-office support that links Fortigent's research, portfolio management and performance reporting tools with its integrated trading and rebalancing functionality, which should enable advisors to operate with optimal efficiency and scalability. Since launching the platform on July 15, 2013, Fortigent has already added four new clients and has shifted over \$700 million of existing client assets to the new platform.

Stan Gregor, President and Chief Executive Officer of Cantor Fitzgerald Wealth Partners, said, "We are very pleased to work with Fortigent to utilize its enhanced platform offerings. Cantor Fitzgerald Wealth Partners and Fortigent share a highly-targeted focus on serving the high-net-worth space."

Jamie McIntyre, President of Fortigent, said, "The new Fortigent platform, which links our research offerings, portfolio management and performance reporting tools into a consolidated workflow that offers integrated trading and rebalancing functionality, represents a significant step forward in back- and middle-office infrastructure for advisors and institutions who serve HNW clients. By combining all of our online service offerings in a single unified, end-to-end platform, Fortigent has established itself as a premier turnkey asset management platform provider that can provide advisors with the full range of tools and technology necessary to serve the entire spectrum of HNW clients' needs, which in turn can empower these advisors and institutions to focus on growing their relationships and expanding their businesses."

Fortigent also announced a major redesign of its corporate website. The new site features an array of content including blogs designed to encourage and enable wide-ranging discussions on key topics, challenges and changes within the HNW advisory community. The site will focus in particular on the factors that differentiate Fortigent - and the advisors and institutions who utilize its service offerings - in order to serve as a destination and hub for innovative advisors dedicated to serving HNW investors. The updated corporate website will also function as the base for Fortigent's enhanced social media outreach activities going forward.

"The pace of change in the high-net-worth segment is accelerating, and Fortigent recognizes that advisors need a place to engage in an active conversation regarding the future of wealth management," said Mr. McIntyre. "We have that conversation with our clients every day, and, through our re-launched corporate website, expanded Advisor and Investor Portals, and enhanced social media outreach, will work to foster active and 'open source' discussions within the HNW community to help advisors translate ideas, data, information, and analysis into actionable insight and trusted advice. Through these new initiatives, we are strengthening communication and engagement among the financial professionals that serve HNW investors, as well as strengthening those between advisors and their clients."

About Fortigent

Fortigent, LLC delivers a unified and customizable end-to-end outsourced wealth management solution to banks, trust companies, MFOs, and independent advisory firms. Services include a broad and open investment platform with particular expertise in alternative investments, a flexible unified managed account program, and consolidated wealth reporting. Fortigent's web-based portal interface allows access to proposal and rebalancing tools, client portfolio reporting and accounting, as well as industry articles, research papers, and other practice management and business development resources.

Fortigent was purchased in 2012 by LPL Financial Holdings Inc. (NASDAQ: LPLA), the ultimate parent company of LPL Financial LLC, the nation's largest independent broker dealer (based on total revenues, *Financial Planning magazine*, June 1996-2013), a

RIA custodian and institutional service provider. For more information about Fortigent, please visit www.fortigent.com. For more information about LPL Financial, please visit www.lpl.com.

*The \$70 billion in assets represents RIA clients who pay a fee for Fortigent's services and/or on a per account basis. The \$70 billion is in addition to the \$397 billion in AUM reported by LPL Financial. In addition, Fortigent provides several services to LPL Financial advisors, including acting as a strategist on LPL Financial's centrally managed Model Wealth Portfolio platform and working with Institution Services to support trust department relationships.

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