



## LPL Financial to Provide Financial Advice and Education through Ingham Retirement Group for Plan Participants

May 30, 2014

LPL Financial to Provide Financial Advice and Education through Ingham Retirement Group for Plan Participants

**San Diego, CA - May 30, 2014** - [LPL Financial](#) LLC, the nation's largest independent broker/dealer, an RIA custodian, and a wholly owned subsidiary of LPL Financial Holdings Inc. (NASDAQ: LPLA) today announced that Ingham Retirement Group will now offer the LPL Financial Worksite Financial Solutions employee advice platform.

Worksite Financial Solutions is an online service that gathers information on each employee participant's financial picture and life stage. After completing a detailed "on-boarding" process, participants can elect to receive personalized advice through the system or manage their accounts on their own. Plan participants can elect to receive advice all the way through retirement as well.

By adopting the Worksite Financial Solutions platform, Ingham Retirement Group will help retirement plan sponsors and advisors better address the needs of plan participants throughout their financial lives, from the date of hire to separation and beyond. The new partnership will also create significant opportunities for LPL Financial advisors to provide these innovative services to more than 190 plans representing approximately \$1.1 billion of retirement assets that are currently served by Ingham Retirement Group.

Ken Ingham, president and CEO of Ingham Retirement Group said, "We are very pleased to partner with LPL Financial, resulting in custom-tailored participant-level advice solutions to plan sponsor clients and participants. By working together to offer this next generation of personalized financial guidance to plan participants, we are putting the financial future of the American worker ahead of proprietary but fragmented solutions."

Bill Chetney, president of LPL Retirement Partners, said "The Worksite Financial Solutions platform represents LPL Retirement Partners' vision for the future of the retirement advisory industry, and enables plan participants to receive the personalized advice they need in order to prepare for the landscape ahead with confidence. We are honored that Ingham Retirement Group recognizes the importance of this vision, and we look forward to working with them and all of our retirement-plan focused advisors to move the industry forward."

### **About Ingham Retirement Group**

Established in 1972, the Ingham Retirement Group (Ingham) is a national, independent, full service retirement plan consulting, investment advisory, record keeping & actuarial firm, with more than \$1.5 billion under administration. Ingham has more than 50 qualified professionals holding various Actuarial, Retirement and Financial/Investment Credentials. Ingham's staff includes an ERISA attorney, CPA, Actuaries, Investment Advisors, Fiduciary Analysts & Compliance Administrators.

### **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 1996-2013), an RIA custodian, and an independent consultant to retirement plans. LPL Financial offers proprietary technology, comprehensive clearing and compliance services, practice management programs and training, and independent research to more than 13,700 financial advisors and approximately 700 financial institutions. In addition, LPL Financial supports approximately 4,500 financial advisors licensed with insurance companies by providing customized clearing, advisory platforms and technology solutions. LPL Financial and its affiliates have more than 3,000 employees with primary offices in Boston, Charlotte, and San Diego. For more information, please visit [www.lpl.com](http://www.lpl.com).

Securities and advisory services offered through LPL Financial. A registered investment advisor, member FINRA/SIPC

LPL Financial and Ingham Retirement Group are not affiliated entities.

### **About LPL Retirement Partners**

LPL Retirement Partners is the retirement plan-focused division of LPL Financial LLC. Through its integrated business platform and team of retirement industry professionals, LPL Retirement Partners supports the operational and practice management needs of retirement plan advisors. Advisors can position themselves with confidence as a discretionary or non-discretionary investment fiduciary to their clients, offering them objective, unbiased guidance on investment options while seeking to increase their marketing reach and strategically grow their practices through the power and commitment of LPL Retirement Partners.

Connect with Us!

<http://twitter.com/lpl>

<https://www.linkedin.com/company/5294>

<https://www.facebook.com/LPLFinancialLLC>

<http://www.youtube.com/user/lplfinancialllc>

Listen: [LPL Financial On The Air](#)

**LPL Financial Media Contact**

Tony Vignieri  
(858) 909-6698

[tony.vignieri@lpl.com](mailto:tony.vignieri@lpl.com)