LPL Financial Integrates RightCapital Within ClientWorks Technology Platform

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CHARLOTTE, N.C., Dec. 15, 2020 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq:LPLA), a leading retail investment advisory firm, independent broker-dealer and registered investment advisor (RIA) custodian, today announced that RightCapital is now integrated with ClientWorks, LPL's advisor technology platform, providing advisors with additional choice and a more streamlined experience to deliver financial planning services to their clients.

RightCapital is a financial planning software that offers retirement planning, budget and debt management, estate planning, and tax efficient distribution tools to advisors. The easy-to-use software offers a robust calculation engine that quickly generates results, offers a user-friendly interface and simplifies the financial planning experience for clients through a centralized client portal. LPL advisors will benefit from an enhanced experience through its integration with the firm's ClientWorks platform, with data seamlessly passing to the tool for greater ease in advisor workflows.

"The shift toward holistic financial planning continues to grow within the wealth management space, and advisors need to continuously evolve their practices and their set of capabilities to be able to serve their clients' most complex needs. As their needs grow, we are meeting advisors where they are with leading solutions that make it easier to run their practices and enhance value with their clients," said Burt White, LPL Financial managing director and chief investment officer. "The addition of RightCapital further enhances our digital ecosystem, powered by tools that give advisors choice and the capacity to create meaningful experiences for their clients and grow their businesses."

"We are very excited to partner with LPL Financial," says RightCapital co-founder and CEO, Shuang Chen. "At RightCapital we are committed to improving the financial planning experience for advisors and their clients. Our integration with the ClientWorks platform achieves this and helps advisors differentiate their services, maximize efficiencies, and drive business growth."

About LPL Financial
LPL Financial (https://www.lpl.com) is a leader in the retail financial advice market, the nation's largest independent broker-dealer** and a leading custodian (or provider of custodial services) to RIAs. We serve independent financial advisors, professionals and financial institutions, providing them with the technology, research, clearing and compliance services, and practice management programs they need to create and grow thriving practices. LPL enables them to provide objective guidance to millions of American families seeking wealth management, retirement planning, financial planning and asset management solutions.

**Based on total revenues, *Financial Planning* magazine June 1996-2020.

Securities and advisory services offered through LPL Financial LLC, an SEC-registered broker-dealer and investment advisor. Member FINRA/SIPC.

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 LLC. We routinely disclose information that may be important to shareholders in the "Investor Relations" or "Press Releases" section of our website.

LPL Financial and RightCapital are not affiliated.

About RightCapital
RightCapital leverages technology to make wealth planning easier and more powerful for financial professionals and their clients. The results: greater efficiency, stronger client relationships, and significant business growth.

Interactive, easy-to-use technology means less time creating financial plans and more time spent with clients. Clear, engaging visualization tools drive home the impact (and value) of the financial professional's retirement, insurance, and tax-planning recommendations. And a modular-based platform provides the ultimate in flexibility.

RightCapital is the fastest-growing financial planning software company in the country. Its rapid innovations, class-leading features, and unbeatable value have revolutionized the financial planning experience and delivered the solutions that today's financial professionals demand. For more information, please visit www.rightcapital.com.

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