LPL Provides Wealth Management to PSECU Members

Mar 16, 2021

LPL Financial's Institutional Services' dedication to growing wealth management programs located at credit unions may help PSECU members pursue their financial goals.

Pennsylvania State Employees Credit Union recently contracted with LPL Financial's Institutional Services for access to an investment program that will help credit union financial advisors help their members pursue their financial goals.

What did PSECU think about LPL Financial?

LPL Financial is the largest provider of third-party investment services to banks and credit unions*, but that wasn't the deciding factor for why PSECU entered into a contract with LPL Financial. "After careful analysis, we determined that LPL put our members in the best position to work toward their financial goals and manage their financial risks," said PSECU President and CEO George Rudolph. "LPL's commitment to client support, dedication to advisor service, and access to a wide array of investment options and innovative technology solutions set them apart from the rest."

New relationship, new opportunities

PSECU is the Keystone state's largest credit union. The new relationship with LPL will provide the wealth management consultants an expanded selection of investment products. This opportunity will help these consultants tailor financial strategies to the unique needs of each credit union member. "[At PSECU] we aim to help our members achieve more, and we believe our new relationship with LPL Financial allows us to do just that," said Rudolph.

Growing and strengthening investment programs

As a leading provider of investment program services, LPL leverages our expertise to help advisors build, sustain, and enhance their relationship with credit union members. Our focus is to design effective investment programs to better serve their clients.

*2019/2020 Kehrer Bielan TPM Survey. Based on financial institution market share.
