



LPL Financial Recognized for Technology Innovation by Bank Insurance & Securities Association

March 22, 2022

CHARLOTTE, N.C., March 22, 2022 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) (Nasdaq:LPLA) today announced that the firm received a 2022 Technology Innovation Award from the Bank Insurance & Securities Association (BISA) for the firm's proprietary solution, Meeting Manager.

"The best innovation happens when we listen to our clients and create solutions to overcome the challenges and hurdles they face in their businesses," said Kirby Horan-Adams, LPL Financial executive vice president, Institution Business Strategy. "We know that one of advisors' most critical, and often most limited, asset is their time. With Meeting Manager, we've been able to give advisors back time in their day by taking the hassle out of meeting prep so they can focus on having more meaningful client conversations."

Meeting Manager is designed to help take the friction out of meeting preparation by streamlining the workflow process and reducing related administrative tasks to create more time in an advisor's day. With Meeting Manager, a click of a button will assemble documents across multiple systems into a bundle that advisors can then customize for their upcoming meeting. The tool was launched to all advisors and institutions in 2021, and is integrated directly into [ClientWorks](#), LPL's existing advisor workstation.

About LPL Financial

LPL Financial (Nasdaq: LPLA) was founded on the principle that the firm should work for the advisor, and not the other way around. Today, LPL is a leader in the markets we serve,* supporting nearly 20,000 financial advisors, and approximately 800 institution-based investment programs and 500 independent RIA firms nationwide. We are steadfast in our commitment to the advisor-centered model and the belief that Americans deserve access to personalized guidance from a financial advisor. At LPL, independence means that advisors have the freedom they deserve to choose the business model, services, and technology resources that allow them to run their perfect practice. And they have the freedom to manage their client relationships, because they know their clients best. Simply put, we take care of our advisors, so they can take care of their clients.

**Top RIA custodian (Cerulli Associates, 2020 U.S. RIA Marketplace Report); No. 1 Independent Broker-Dealer in the U.S (Based on total revenues, Financial Planning magazine 1996-2021); No. 1 provider of third-party brokerage services to banks and credit unions (2020-2021 Kehler Bielan Research & Consulting Annual TPM Report); Fortune 500 Company as of June 2021. LPL and its affiliated companies provide financial services only from the United States.*

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 BISA are separate entities.

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