



## LPL Financial to Present at the Credit Suisse 24th Annual Financial Services Forum

February 7, 2023

SAN DIEGO, Feb. 07, 2023 (GLOBE NEWSWIRE) -- [LPL Financial](#) LLC (Nasdaq: LPLA) today announced that Chief Financial Officer Matt Audette will present at the Credit Suisse 24<sup>th</sup> Annual Financial Services Forum on February 14.

The presentation takes place at 11:05 a.m. ET. A live audio webcast of the presentation will be accessible at [investor.lpl.com](#), with a replay available on the website after the presentation. The replay will remain available through March 7.

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### **About LPL Financial**

LPL Financial Holdings Inc. (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\*, serving more than 21,000 financial advisors, including advisors at approximately 1,100 enterprises and at approximately 500 registered investment advisor ("RIA") firms nationwide. We are steadfast in our commitment to the advisor-mediated model and the belief that investors deserve access to personalized guidance from a financial advisor. We believe advisors should have the freedom to choose the business model, services and technology they need and to manage their client relationships. 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 1996-2022); and, among third-party providers of brokerage services to banks and credit unions, No. 1 in AUM Growth from Financial Institutions; No. 1 in Market Share of AUM from Financial Institutions; No. 1 in Market Share of Revenue from Financial Institutions; No. 1 in Financial Institution Market Share; No. 1 in Share of Advisors (2021-2022 Kehler Bielan Research and Consulting Annual TPM Report). Fortune 500 as of June 2021.*

*LPL Financial and its affiliated companies provide financial services only from the United States.*

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