# LPL Financial

# LPL Financial Welcomes OUCU Investment Services to the LPL Institution Services Platform

Oct 12, 2023

CHARLOTTE, N.C., Oct. 12, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that OUCU Financial's investment program, OUCU Investment Services, has joined LPL's Institution Services platform. OUCU Investment Services is made up of two advisors who collectively service approximately $230 million of brokerage and advisory assets.* OUCU Investment Services joins from CUSO Financial Services.

In 1955, Dr. Harry Crewson, a professor of economics and later president of Ohio University, founded OUCU Financial on the belief that university employees needed a place to borrow money at reasonable rates. With the approval of the university president, a pioneering spirit and $25 in hand, OUCU Financial opened for business on the university campus. What started as a small operation with only 112 members has grown to more than 26,000 members.

"Since day one, OUCU Financial has gone above and beyond to help our members live their best lives, and our partnership with LPL is aimed at taking that promise to the next level," said OUCU Financial CEO Cory Corrigan. "LPL and OUCU Investment Services are both committed to thinking big, reinvesting in our futures and consistently exceeding expectations. By leveraging LPL's best-in-class technology platform and institution support, we are expanding our capabilities and capturing new opportunities to deliver wealth advisory services to more members and communities."

"We extend a warm welcome to the OUCU Investment Services team as they join LPL's network of institution clients," said Ken Hullings, executive vice president of Enterprise Business Development, LPL Financial. "OUCU Investment Services is committed to making a positive difference in the lives of their members and community. In turn, LPL is committed to supporting OUCU Investment Services by providing its advisors with cutting-edge technology, planning resources and operational support to differentiate their services in a competitive marketplace. We look forward to partnering with the team as OUCU Investment Services continues to help their members prosper."

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**About OUCU Financial**
OUCU Financial is a not-for-profit financial cooperative with over $507 million in assets and serving over 26,000 members. With three branches in Athens, OUCU Financial offers a full suite of business and consumer banking products and services. It also provides its members with nationwide access through the CO-OP Shared Branching Network and two no-surcharge ATM networks. Learn more at http://www.oucu.org

**About LPL Financial**
LPL Financial Holdings Inc. (Nasdaq: LPLA) was founded on the principle that LPL should work for advisors and enterprises, and not the other way around. Today, LPL is a leader in the markets we serve, serving nearly 22,000 financial advisors, including advisors at approximately 1,100 enterprises and at approximately 550 registered investment advisor ("RIA") firms nationwide. We are steadfast in our commitment to the advisor-mediated model and the belief that Americans deserve access to personalized guidance from a financial professional. At LPL, independence means that advisors and enterprise leaders have the freedom they deserve to choose the business model, services, and technology resources that allow them to run a thriving business. They have the flexibility to do business *their* way. And they have the freedom to manage their client relationships because they know their clients best. Simply put, we take care of our advisors and enterprises so they can take care of their clients.



**Value approximated based on asset and holding details provided to LPL from year-end 2022.*

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