LPL Financial Releases 2024 Sustainability Report

Apr 9, 2024

SAN DIEGO, April 09, 2024 (GLOBE NEWSWIRE) -- LPL Financial Holdings Inc. (Nasdaq: LPLA) (the “Company”), the parent corporation of LPL Financial LLC, today announced the release of its 2024 Sustainability Report. The report details the Company’s progress toward its environmental, social and governance (ESG) goals in key focus areas that guide LPL’s approach to sustainability, responsible business, people and culture, societal impact and environmental stewardship.

Highlights from this year’s report include:

- The LPL Financial Charitable Foundation was awarded *ThinkAdvisor’s* LUMINARIES Community Impact Award for its funding of LISC (Local Initiatives Support Corporation) to aid small businesses in San Diego
- Earned the WELL Health-Safety Rating for three of LPL’s corporate campuses
- Had over 2,300 employees participate in LPL’s 10 Employee Resource Groups
- Launched a virtual clinic for employees and their eligible dependents to help reverse Type 2 diabetes
- Honored by Newsweek as one of “America’s Most Responsible Companies” and one of “America’s Greenest Companies”

The 2024 Sustainability Report demonstrates LPL’s dedication to its stakeholders – including more than 22,000 financial advisors and the millions of client accounts they serve – by disclosing the firm’s actions toward operating responsibly and ethically. The report includes Sustainable Accounting Standards Board* and Global Reporting Initiative** indexes to further the firm’s initiative of transparency.

The full report can be found on LPL.com.

About LPL Financial

LPL Financial Holdings Inc. (Nasdaq: LPLA) was founded on the principle that the firm should work for advisors and institutions, and not the other way around. Today, LPL is a leader in the markets we serve, serving more than 22,000 financial advisors, including advisors at approximately 1,100 institutions and at approximately 570 registered investment advisor 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 institution 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 institutions, so they can take care of *their* clients.

**Sustainable Accounting Standards Board provides standards to identify the subset of environmental, social and governance issues most relevant to financial performance and enterprise value for 77 industries. The Standards were developed using a rigorous and transparent standard-setting process and global investors recognize SASB Standards as essential requirements for companies seeking to make consistent and comparable sustainability disclosures.*

***The Global Reporting Initiative Standards enable any organization to understand and report on their impacts on the economy, environment and people in a comparable and credible way, thereby increasing transparency on their contribution to sustainable development.*

Securities and Advisory services offered through LPL Financial LLC ("LPL Financial"), a registered investment advisor. Member FINRA/SIPC. LPL Financial and its affiliated companies provide financial services only from the United States.

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.

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

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