



## LPL Financial CEO Rich Steinmeier Addresses Over 6,000 Financial Advisors at Focus 2025

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### LPL outlines its roadmap for transforming the wealth management industry and delivering long-term value to financial advisors and the clients they serve

SAN DIEGO, Aug. 12, 2025 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#), a leading wealth management firm, convened more than 10,000 attendees, including 6,000 financial advisors from across the country, for its flagship annual conference Focus 2025 at the San Diego Convention Center. Monday's event began with a keynote address from LPL Financial CEO Rich Steinmeier, who spoke to LPL's role in driving the future of the wealth management industry.

"Focus is more than a conference — it's a catalyst for transformation," said Steinmeier. "As we gather here in San Diego, we're not just celebrating what we've achieved; we're charting the course for what comes next. Our advisors are the heartbeat of the wealth management industry, and together, we're building a future that's more connected, more personalized and more impactful."

Steinmeier was joined by members of LPL's executive leadership team who spoke to the firm's commitment to innovation and transformation across wealth management and technology.

#### Executive Highlights

- Greg Gates, Chief Technology and Information Officer, explained how technology is central to and rapidly evolving within wealth management, requiring firms and advisors to adopt a tech-forward approach to meet client expectations. "Technology is no longer just an enabler — it's a strategic partner in delivering better outcomes for advisors and their clients," Gates noted.
- Aneri Jambusaria, Chief Wealth Officer, emphasized the importance of personalized, client-centered wealth management supported by LPL's extensive expertise and tools. "It's not enough for advice to be good," noted Jambusaria. "It needs to be great — driving exceptional alpha, demonstrating the highest expertise and enabled by wealth tools and solutions that are among the best of the best."

#### Technology to Make Doing Business Easier

From AI-powered efficiency to technology platform modernization, Gates and the LPL team showcased the firm's latest innovations, including:

- **Modernized Compensation Platform:** LPL unveiled a \$50 million investment to transform advisor compensation with AI-powered forecasting, multi-custody tracking and deep analytics — bringing clarity and intelligence to one of the most complex aspects of a financial practice.
- **AI Advisor Solutions:** LPL's suite of AI tools continues to expand, with meeting management standout Jump automating prep, syncing with CRM systems and flagging personal details — saving advisors 30–45 minutes per client meeting and over 72,000 hours across the platform.
- **Infrastructure and Security:** Major investments in data centers, cloud infrastructure and a 24/7 security operations center reflect LPL's commitment to delivering on its "security first" principle to help safeguard information on behalf of advisors and their clients.
- **Platform Modernization:** Enhancements to ClientWorks Rebalancer — a key component of LPL's advisor platform — mean it now supports real-time model management and trade execution. And WealthVision Essentials, built with eMoney, is fully integrated to bring financial planning into every advisor-client conversation.

"Technology isn't just a tool anymore—it's the rails on which your business runs," said Gates. "We're building platforms that are secure, scalable and built for change, so advisors can compete and thrive."

#### Wealth Management Powered by Technology and AI

LPL's wealth strategy is deeply intertwined with its technology roadmap. During day one's general session, Jambusaria highlighted a suite of innovations designed to deliver personalized advice at scale:

- **Alts Connect and Alts Learning Hub:** These platforms simplify access to alternative investments like hedge funds, private equity, private credit and real estate, and provide educational resources that empower advisors to meet the evolving needs of high-net-worth clients with confidence.

- **Banking and Lending Solutions:** A cash management account (CMA) that bridges short-term cash flow with long-term investment strategies is in pilot and will be fully integrated into ClientWorks and supported by a service center for advisors. LPL also unveiled plans to launch an in-house securities-backed lending solution in 2026.
- **Expanded Separately Managed Account (SMA) Offerings:** LPL Research is launching new equity and fixed income SMAs, backed by a team of 40 investment professionals managing \$85B in assets.
- **Business Exit Planning and Investment Banking:** Advisors now have access to specialized support and strategic relationships with eight top investment banks to guide small business owners through successful exits.
- **Model Wealth Portfolios (MWP):** With over 350 SMA choices and new advisor sleeve capabilities, MWP helps advisors deliver personalization at scale, supported by top-quartile model performance.

Today, President and Chief Financial Officer Matt Audette will open the final general session with updates on operations, service and compliance improvements, and Chief Client Officer Matt Enyedi as well as Chief Marketing and Communications Officer Christa Carone will share a thematic look at LPL's new brand platform.

### **About LPL Financial**

LPL Financial Holdings Inc. (Nasdaq: LPLA) is among the fastest growing wealth management firms in the U.S. As a leader in the financial advisor-mediated marketplace, LPL supports over 29,000 financial advisors and the wealth management practices of approximately 1,100 financial institutions, servicing and custodialing approximately \$1.9 trillion in brokerage and advisory assets on behalf of approximately 7 million Americans. The firm provides a wide range of advisor affiliation models, investment solutions, fintech tools and practice management services, ensuring that advisors and institutions have the flexibility to choose the business model, services, and technology resources they need to run thriving businesses. For further information about LPL, please visit [www.lpl.com](http://www.lpl.com).

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