



LPL Financial Advisors Embrace AI's Potential for Business Growth, Increased Capacity, Survey Finds

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LPL advisors attending the firm's flagship conference, Focus 2025, expressed enthusiasm for new technologies and expanding their offerings

SAN DIEGO, Sept. 04, 2025 (GLOBE NEWSWIRE) -- More than three-quarters of financial advisors (78%) surveyed at LPL Financial LLC's flagship annual conference are already leveraging or plan to use AI tools to create capacity in their businesses this year.

AI enables advisors to improve capacity and personalize client experience

As the firm continues to bolster its platform, LPL advisors are approaching new technologies with enthusiasm, viewing these tools as catalysts for growth. More than half of LPL advisors surveyed (54%) plan to grow their businesses by upgrading technology systems, including AI and automation tools. When asked what they see as the biggest challenge to their business over the next 12 months, only 12% of the advisors surveyed identified disruptive technology, like AI – compared to challenges such as economic/market volatility (23%) and sustaining growth with their client base (23%).

"The advisors and institutions who affiliate with LPL are incredibly innovative and lean into technology that not only generates operational efficiency but also allows them to create more personalized client experiences at scale," said Matt Enyedi, group managing director and chief client officer at LPL. "The solutions we provide and those we're working on are designed based on this feedback. Through our investments and addressing advisors' needs, we continue to automate time-consuming processes such as account opening and management, document imaging, transaction execution and account rebalancing, all to improve advisor efficiency and accuracy. In a constantly evolving landscape, we know our clients are looking for new ways to serve and engage with their clients, and we are using our scale to invest in technologies and solutions that help them do that today and into the future."

In 2024, LPL [invested](#) \$470 million into technology development and innovation, leveraging advisor feedback to drive improvements intended to be most impactful for them. At Focus 2025, the firm [showcased](#) its latest innovations, including expanding the suite of AI tools available to advisors, major investments in infrastructure and security and a \$50 million investment to transform advisor compensation – all of which are designed to help make doing business easier for LPL advisors.

Advisor priorities are clear, with 66% adopting new technology or platforms to create capacity in their businesses

The survey also found that LPL advisors are looking to add wealth management services to grow their businesses, with one-in-five (18%) expecting to expand their offerings of alternative investments and more than a third (37%) hoping to provide additional planning or concierge services such as financial coaching or estate planning. LPL advisors intending to expand up-market to serve higher-net-worth clients are prioritizing adding more wealth planning services to their offering (34%) and cultivating center-of-influence relationships with CPAs and attorneys (24%).

Advisors surveyed also reported a wide range of interests from their client base, with clients asking them the most about: market volatility, including tariffs, inflation and geopolitical instability (62%); goals-based financial planning, including retirement readiness (50%); tax optimization (49%); estate and wealth transfer planning (43%); and managing rising costs such as housing or healthcare (28%).

To learn more about how LPL supports financial advisors with wealth management services, technology and offerings, visit www.lpl.com.

Methodology

LPL Financial's Focus Survey collected data from more than 200 LPL financial advisors representing both independent firms and institutions. Data was collected on-the-ground during LPL's flagship annual conference Focus 2025, which was held in San Diego from August 10-12, 2025. The survey aimed to better understand financial advisor perspectives on priorities, challenges and trends over the next 12 months.

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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.

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