LPL Financial Celebrates Industry-Leading Milestone: Over 6,000 Advisors Achieve CFP® Certification

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Milestone highlights LPL's enduring commitment to financial planning innovation and leadership

SAN DIEGO, Jan. 27, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC, a leading wealth management firm, today announced that 6,200 LPL-affiliated financial advisors have earned the CERTIFIED FINANCIAL PLANNER™ (CFP®) designation as of December 31, 2025 — the most of any firm in the industry.

This achievement reflects LPL's continued investment in the technology, services and infrastructure that define the modern advisor experience and elevate quality advice.

"Reaching this milestone is more than a numerical achievement — it underscores our unwavering commitment to advancing the profession through planning-led advice," said Tara Popernik, executive vice president of wealth planning at LPL. "We are proud to set the pace for CFP® representation in the industry and to equip advisors with integrated planning capabilities that elevate the standard of wealth management."

A Category-Defining Approach to Planning Technology
According to Cerulli research, a majority of investors want a written financial plan, yet many advisor relationships remain focused primarily on investments. LPL is helping bridge this gap by equipping advisors with resources to scale and deepen their planning capabilities, including:

- **Integrated Planning Software:** Empowering advisors with a curated set of planning tools that fully integrate into LPL's advisor platform ClientWorks, making the financial planning process more efficient and effective.
- **Paraplanning and High-Net-Worth Services:** Enhancing the sophistication of planning efforts for complex client needs.
- **Financial Planning Case and Practice Management Support:** Optimizing client experience and value through robust planning processes.

Together, these capabilities represent a planning-forward platform that elevates the independent advisor experience and expands access to sophisticated financial planning nationwide.

Setting the Standard for Planning Excellence
CFP® certification represents the highest standard in financial planning. LPL's leadership aligns with the firm's commitment to fiduciary-aligned advice delivered at scale. CFP® professionals must adhere to rigorous standards of competence and ethics, including a fiduciary duty to act in their clients' best interests.

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 32,000 financial advisors and the wealth management practices of approximately 1,100 financial institutions, servicing and custodying approximately $2.3 trillion in brokerage and advisory assets on behalf of approximately 8 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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