



LPL Financial Wins Two Stevie Awards for Innovation in Artificial Intelligence Concepts

May 14, 2026

SAN DIEGO, May 14, 2026 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) today announced that it has been recognized with two Stevie® Awards in the 2026 American Business Awards®, honoring the firm's leadership in designing artificial intelligence (AI) concepts with the potential to transform the advisor and investor experience. LPL Financial earned a Stevie Award for Achievement in the Use of AI for its prototype AccountView Next Gen web experience, a conceptual, personalized, AI-powered digital wealth platform for advisors and investors. The firm also received a Stevie Award for Best Use of Generative AI Technology for AccountView Next Gen Mobile, recognizing one of the most comprehensive prototypes of generative AI in wealth management on a mobile platform.

Together, the two awards highlight LPL Financial's commitment to developing AI across platforms while maintaining strong standards for governance, security, explainability and compliance.

"These awards validate our belief that AI will deliver the greatest impact when it is thoughtfully designed, responsibly governed and deeply embedded into how advisors and investors actually work," said LPL Chief Technology and Information Officer Greg Gates. "Across both web and mobile, LPL is developing concepts with the potential to deliver real-world outcomes — preparing for the use of AI to accelerate innovation, enhance trust and deliver more personalized, intuitive experiences at scale for advisors."

The [American Business Awards®](#), known as the Stevies, are among the most respected business awards programs in the U.S., recognizing excellence in innovation, technology and performance across industries. LPL Financial's wins underscore the firm's continued investment in AI-driven platforms that elevate the advisor and investor experience while setting new standards for responsible innovation in wealth management.

The program recognizes new initiatives, programs, or enhancements to an existing platform that help advisors be more efficient and enhance the advisor and client experience through technology. This award was self-nominated and nominees paid no fee to participate. Nominees were considered from approximately 1,500 nominations from 35 nations for the year 2025.

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 more than 32,000 financial advisors and the wealth management practices of approximately 1,100 financial institutions, servicing and custodialing 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.

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.

Media Contact:

Media.relations@LPLFinancial.com

(402) 740-2047

Tracking #: 1107868