LPL Financial

LPL Research Launches New Model Portfolios to Expand Advisor Capabilities

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SAN DIEGO , Aug. 04, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC today announced that LPL Research has launched a new suite of Building Block Model Portfolios, expanding its model portfolio platform to more than 70 offerings. Designed to provide advisors with greater flexibility in portfolio construction, the new models can be combined to create customized investment solutions tailored to a broad range of client objectives. The launch reflects LPL Research's continued investment in portfolio innovation and comes as its model portfolio platform surpassed $100 billion in assets under management (AUM).

Introducing Building Block Model Portfolios

LPL Research has introduced 17 Building Block Model Portfolios designed to provide advisors with greater portfolio construction flexibility. The new models include single-asset mutual fund, ETF and SMA strategies across equities, fixed income and alternatives.

The models can be used independently or combined within Unified Managed Account (UMA) structures, enabling advisors to build tailored portfolios aligned with clients' investment objectives and risk preferences.

“The introduction of our building block model portfolios enhances the flexibility and choice we provide to advisors and institutions,” said LPL Chief Investment Officer Marc Zabicki. “Grounded in our research and asset allocation expertise, these modular solutions are designed to help build more personalized portfolios and adapt investment strategies to reflect evolving client needs.”

Growing Adoption of LPL Research Models

The launch comes as LPL Research's model portfolio platform surpasses $100 billion in AUM (as of February 2026), reflecting continued advisor adoption of professionally managed investment solutions. The milestone underscores the platform's growth and the increasing demand for model-based portfolio management across advisory practices.

“Surpassing $100 billion in model portfolio assets reflects the strength of our investment platform, the performance of our strategies and the trust advisors place in our team,” said LPL Chief Wealth Officer Aneri Jambusaria. “When we pursue strong investment outcomes, our community is better positioned to help clients pursue their financial goals. That impact extends to the more than 8 million Americans served through the LPL platform, and it remains at the center of everything we do.”

Expanding Portfolio Construction Capabilities

The Building Block Model Portfolios are designed to give advisors greater control over portfolio design through a modular approach that spans equities, fixed income and alternatives. Used individually or within UMA structures, the models allow advisors to create more customized investment strategies while benefiting from the ongoing oversight and expertise of LPL Research.

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 $2.6 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.

Securities and advisory services offered through LPL Financial LLC (“LPL Financial”), a registered investment advisor and broker-dealer, member FINRA/SIPC.

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.

There is no assurance that advisory model portfolios are suitable for all investors or will yield positive outcomes.

The purchase of certain securities will be required to affect some of the strategies. Investing involves risks, including possible loss of principal. This material is general information only and is not intended to provide specific advice or recommendations for your clients.

Advisory accounts may not be appropriate for every investor. A brokerage account may be more appropriate if your client prefers a buy-and-hold strategy.

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