



LPL Financial Opens Focus 2026, Bringing Together Thousands of Advisors to Explore the Future of Wealth Management

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Firm showcases investments in AI, cybersecurity and wealth management solutions designed to help financial professionals thrive in a rapidly evolving industry

SAN DIEGO, Aug. 10, 2026 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) kicked off Focus 2026 yesterday, the firm's premier annual conference, bringing together thousands of financial advisors, institutional leaders and industry professionals for three days focused on growth, innovation and the future of the wealth management industry.

The conference theme, *Unlocking Boundless Human Potential*, explores how innovation across technology, wealth management and client experiences can help financial professionals strengthen relationships, grow their businesses and deliver more value.

In his keynote address, LPL Financial Chief Executive Officer Rich Steinmeier described how transformative technologies have historically replaced tasks, not professions. Drawing parallels to innovations that reshaped industries throughout history, Steinmeier said AI represents the next evolution of advice, helping advisors unlock administrative capacity so they can focus more on the uniquely human elements of their profession, including judgment, client relationships, empathy and personalized guidance.

Speaking to a crowd of more than 6,000 advisors, Steinmeier said, "Will AI replace the advisor? Quite simply, no. Those who embrace AI will become more valuable. The future of advice is more human. Our investments in technology and AI are designed to help advisors spend less time on routine tasks and more time helping clients navigate life's most important financial decisions."

Chief Client Officer Matt Enyedi highlighted investments designed to help advisors operate more efficiently and deliver a better client experience, including enhanced cybersecurity protections, expanded mobile access, improved communication tools, a more client-centric operating system for advisors and streamlined account management capabilities.

"When advisors have the right experience, everything changes," said Enyedi. "Our role is to remove friction and make it easier for our clients to run their businesses, serve their clients and pursue growth on their own terms. Every innovation we deliver is designed to help advisors spend less time navigating systems and more time creating meaningful outcomes."

The general session concluded with a presentation from Chief Technology and Information Officer Greg Gates, who highlighted LPL's nearly \$2 billion investment over the past three years to modernize its technology infrastructure, strengthen cybersecurity and establish the foundation for scaling AI across the advisor experience.

Central to that strategy is **LPL Latitude**, the firm's unified technology experience that brings together data, workflows, cybersecurity and intelligence to create a more seamless advisor experience and power future innovation.

Gates described Latitude as more than a traditional technology system, positioning it as a fundamental evolution in how LPL delivers technology to advisors. Rather than deploying AI as a standalone tool, LPL is embedding intelligence directly into advisor workflows to deliver more personalized, relevant and actionable support.

Gates also demonstrated **Cyan**, LPL's AI agent and a core asset of Latitude, which is designed to enhance advisor efficiency by providing contextual guidance, surfacing timely insights and streamlining everyday tasks within ClientWorks, LPL's advisor operating system. Future capabilities are expected to support financial planning workflows, generate personalized client meeting materials for review and deliver practice management insights designed to help advisors identify growth opportunities.

Looking ahead, Gates shared LPL's vision for a more proactive, agentic AI experience in which Cyan not only informs and guides, but also helps advisors take action, by initiating workflows, preparing draft communications and identifying opportunities directly within their daily work. By doing so, Cyan will give advisors more time to focus on what matters most: delivering personalized advice, deepening client relationships and growing their businesses.

"The best technology isn't technology that shows off what we can build," said Gates. "It's technology that understands people and helps make their lives better. And that idea — that the most powerful technology is human centered — has shaped how we innovate at LPL."

LPL Focus 2026



LPL CEO Rich Steinmeier delivers the keynote address at Focus 2026

As Focus 2026 continues, attendees will hear from LPL leaders on the transformative opportunities shaping the future of advice, including AI, market dynamics, service innovation and partnership, all aligned to the firm's vision of helping advisors unlock boundless human potential.

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 \$2.6 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.

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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.

Forward-Looking Statements

Certain of the statements included in this release, such as those regarding the potential future impact of AI, the expected introduction of operational and technological capabilities and enhancements, and the anticipated benefits of the Latitude platform, including the Cyan AI agent, and other technology investments made by the company, constitute forward-looking statements. Words such as "expects," "believes," "anticipates," "plans," "assumes," "estimates," "projects," "intends," "should," "will," "shall" or variations of such words are generally part of forward-looking statements. Forward-looking statements are made based on current expectations and beliefs concerning future developments and their potential effects on LPL Financial. In particular, no assurance can be provided that all currently anticipated enhancements will be made this year or at all; that Cyan will launch as anticipated; and that the expected benefits to advisors and end-clients from the Company's technology investments, including the Latitude platform and Cyan, will materialize. These forward-looking statements are not a guarantee of future performance and involve risks and uncertainties, including economic, legislative, regulatory, competitive and other factors, and there are certain important factors that could cause actual results or the timing of events to differ, possibly materially, from expectations or estimates expressed or implied in such forward-looking statements. Important factors that could cause or contribute to such differences include: difficulties in developing new technologies and integrating them into our business; changes in general economic and financial market conditions, including retail investor sentiment; the effects of competition in the financial services industry and the success of LPL Financial in attracting and retaining financial advisors and institutions, and their ability to market financial products and services effectively; the effect of current, pending and future legislation, regulation and regulatory actions, including disciplinary actions imposed by federal and state regulators and self-regulatory organizations; and the execution of LPL Financial's plans and its success in realizing the synergies, expense savings, service improvements or efficiencies expected to result from its investments, initiatives, acquisitions and expense plans. Certain additional important factors that could cause actual results or the timing of events to differ, possibly materially, from expectations or estimates expressed or implied in such forward-looking statements can be found in the "Risk Factors" and "Special Note Regarding Forward-Looking Statements" sections included in LPL Financial Holdings Inc.'s most recent Annual Report on Form 10-K. Except as required by law, LPL Financial does not undertake to update any particular forward-looking statement included in this document as a result of developments occurring after the date of this press release.

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A photo accompanying this announcement is available at <https://www.globenewswire.com/NewsRoom/AttachmentNg/251a70de-8ba0-4159-8782-4e11ae6a02b6>