



LPL Financial Expands Wealth Management Platform, Showcasing Specialized Expertise at Focus 2026

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Firm expands wealth management platform, specialized expertise and planning capabilities to help advisors deliver more sophisticated and personalized advice

SAN DIEGO, Aug. 11, 2026 (GLOBE NEWSWIRE) -- Building on the conference theme of *Boundless Potential*, LPL Financial leaders continued to highlight how technology-enabled efficiency is creating greater capacity for advisors to deliver more personalized, comprehensive wealth management services.

CEO Rich Steinmeier reinforced the firm's vision for the future of wealth management, highlighting how technology, human expertise and integrated capabilities are coming together to help advisors deliver more meaningful outcomes for clients.

"The future of wealth management belongs to advisors who deliver personalized advice across every aspect of a client's financial life," said Steinmeier. "Our strategy is focused on giving advisors the capabilities, expertise and flexibility they need to deepen relationships, grow their businesses and create exceptional outcomes for clients."

Chief Wealth Officer Aneri Jambusaria showcased how LPL is expanding its wealth management capabilities to help advisors serve a broader range of client needs through more connected planning, investing and lending solutions.

"Clients aren't buying the 'science' of wealth management; they're buying peace of mind," said Jambusaria. "As technology simplifies the technical work, the true differentiator becomes the 'craft' of wealth management. Our role is to help advisors deliver the craft at scale through expanded capabilities, specialized expertise and integrated solutions that make it easier to address every aspect of a client's financial life."

During her presentation, Jambusaria outlined enhancements across investment management, alternative investments, tax planning, banking and lending, and high-net-worth (HNW) services, all designed to help advisors deliver more comprehensive wealth management.

Among the announcements:

- **Model Wealth Portfolios:** LPL's Model Wealth Portfolios platform has grown to more than \$200 billion and will lower investment minimums to \$1,000 later this year, making professionally managed investment solutions more accessible across a broader range of client relationships.
- **Alternative Investments:** The firm's alternatives platform now provides access to nearly 110 strategies across private equity, real estate and tax-advantaged solutions.
- **Banking and Lending:** LPL continues to advance development of its in-house securities-backed lending offering, the Secured Credit Account, while expanding integrated cash management capabilities.

Jambusaria also highlighted the firm's growing support for HNW and ultra-high-net-worth (UHNW) clients. Today, more than \$300 billion in HNW and UHNW assets reside on LPL's platform, supported by personalized planning resources and dedicated expertise.

A key component of that strategy is **Private Wealth Partners**, a specialized offering that connects advisors with professionals in areas that include tax planning, equity compensation, business succession, and trust and estate planning.

Throughout the conference, advisors were given insights on how embracing a comprehensive wealth management approach helps drive stronger growth by integrating planning, investment management, retirement income, banking and specialized advice into a more holistic client experience.

"Today, clients expect advice that extends beyond investing alone," Jambusaria said. "We're continually expanding what's possible on the LPL platform so advisors can deliver advice across more dimensions of a client's financial life while focusing their time on the relationships, judgment and trust that create lasting value."

About LPL Financial

LPL Focus 2026



LPL's Chief Wealth Officer, Aneri Jambusaria, speaks to a crowd of 6,000 clients during General Session

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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