LPL Financial

LPL Financial Demonstrates Benefits of Platform Scale, Service Innovation and Investment Expertise as Growth Drivers for Clients

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The firm concludes its annual client conference, Focus 2026, showcasing how scale and community create an unparalleled value proposition for its network of clients, advisors and partners

LPL Focus 2026

LPL Chief Growth Officer Marc Cohen shares updates from the stage at Focus 2026

SAN DIEGO, Aug. 12, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC concluded Focus 2026, the firm's premier annual conference, by highlighting how its scale, research capabilities and integrated platform help its clients grow more efficiently while preserving the flexibility and personalized experience that define successful financial advisory businesses. The conference's closing sessions focused on how advisors are leveraging LPL's expanding technology, workflows and investment capabilities to grow faster, serve clients more comprehensively and build enduring businesses.

Unified Technology and Service Built for the Future

Building on the technology vision unveiled earlier in the conference, LPL leaders highlighted how investments in AI-powered workflows, service modernization and integrated advisor experiences are helping advisors spend less time navigating complexity and more time serving their clients.

President and Chief Financial Officer Matt Audette described how LPL is further integrating technology, service and operations to deliver a simpler and more streamlined advisor experience. "By combining AI-powered workflows, real-time access to information and greater visibility into service requests, we're creating experiences that are faster, more transparent and more reliable," said Audette in speaking to the 10,000 clients and partners attending this year's Focus. "Your success is our success, and we're committed to delivering the service and support that help advisors thrive."

Research and Investment Expertise to Support Advisor Success

During his session, Chief Investment Officer Marc Zabicki detailed LPL Research's market outlook while emphasizing the team's commitment to serving as an extension of LPL clients' businesses through institutional-quality research, portfolio construction capabilities and investment guidance.

"Our mission is to be a trusted business partner by providing the insights, strategies and investment expertise advisors need to navigate uncertainty and serve clients with confidence," said Zabicki.

A recurring theme throughout Focus 2026 was LPL's commitment to helping advisors leverage scale without sacrificing independence. Chief Growth Officer Marc Cohen highlighted how the firm's platform is designed to support a wide range of business models while enabling advisors to maintain the distinctive client experiences and personal brands that set them apart. He emphasized that scale should expand choice and opportunity rather than impose a one-size-fits-all approach.

"Great platforms don't create sameness," said Cohen. "They create freedom for different experiences to thrive. Whether an LPL client is independent, affiliated with a bank or credit union, operating an RIA or part of an employee model, our role is to provide the scale, capabilities and infrastructure that help them deliver highly personalized advice while building the business they envision."

Cohen highlighted how advisors across channels benefit from investments in technology, operations, service and infrastructure that would be difficult to replicate independently. He emphasized that the true value of scale is not size alone, but the ability to help advisors reduce complexity so they can focus on delivering meaningful outcomes for clients during life's most important moments.

Across the conference, LPL leaders highlighted a common theme: empowering their clients through an integrated combination of technology, expertise, research and service. Together, these investments reflect the firm's long-term commitment to evolving alongside clients and helping them meet the changing needs of investors.

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 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.

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