LPL Financial

November 18, 2014

LPL Financial Launched New Resource Center to Better Serve Advisors and Institutions

Charlotte, North Carolina (PRWEB) November 18, 2014

LPL Financial LLC, the nation's largest independent broker-dealer*, a custodian for registered investment advisors (RIAs), and a wholly owned subsidiary of LPL Financial Holdings Inc., has launched a newly recreated and redesigned Resource Center. The new site was rebuilt to provide streamlined access to the breadth of LPL's advisor resources, including critical information, research insights, tools, forms and training resources, as well as meaningfully improved search capabilities.

"LPL's Resource Center is the central information hub for our advisors and institutions, and a vital tool for helping them manage their practice and serve their clients. As such, we knew that any effort to rebuild the site would need to begin and end with a focus on their experience and feedback," said Robert Moore, president, LPL Financial. "As a result of this collaboration, we are proud to deliver a tool that we believe will unlock real value for LPL advisors, generating efficiencies that allow them to focus more of their time on serving their clients with objective financial guidance."

LPL undertook an iterative process to rebuild the Resource Center. With a continued focus on our advisor's experience, LPL collaborated with a pilot group made up of more than 600 advisors and sales assistants who used the site in their day to day work in order to identify opportunities to improve the functionality of the site. Based on the input of these pilot users and other LPL advisors and institutions, LPL identified several key areas for improvement, among them:

- A new, modernized look - The new site reflects advanced thinking in user interface design.
- Improved search - A new search engine provides predictive search and an easier way to find forms.
- Intuitive navigation - The new menu represents advisor feedback on how they intuitively like to see information organized.
- Video / rich media - More rich media, including videos, making the content more engaging.

In the five months since the Resource Center has been in the field, pilot group advisors reported a 240 percent increase in overall satisfaction, when comparing the scores of the old Resource Center to those of the new version.

"The new Resource Center is the latest in a string of new and enhanced technology solutions that demonstrate LPL's commitment to providing a flexible, integrated platform that delivers efficiencies and increased productivity to our advisors," said Victor Fetter, chief information officer, LPL Financial. "We look forward to continuing this evolution of our technology offering with the launch of ClientWorksSM, a next-generation technology solution for advisors and institutions that will seamlessly integrate and expand LPL's offerings and will eventually replace our BranchNet platform."

About LPL Financial
LPL Financial, a wholly owned subsidiary of LPL Financial Holdings Inc., is a leader in the financial advice market and serves $465 billion in retail assets. The Company provides proprietary technology, comprehensive clearing and compliance services, practice management programs and training, and independent research to more than 13,900 independent financial advisors and more than 700 banks and credit unions. LPL Financial is the nation's largest independent broker-dealer since 1996 (*based on total revenues, Financial Planning magazine, June 1996-2014), is one of the fastest growing RIA custodians with $84 billion in retail assets served, as of September 30, 2014, and acts as an independent consultant to more than 40,000 retirement plans with approximately $110 billion in retirement plan assets served. In addition, LPL Financial supports approximately 4,400 financial advisors licensed with insurance companies by providing customized clearing, advisory platforms and technology solutions. LPL Financial and its affiliates have 3,397 employees with primary offices in Boston, Charlotte, and San Diego. For more information, please visit http://www.lpl.com.

Securities and Advisory Services offered through LPL Financial. A Registered Investment Advisor, Member FINRA/SIPC

Connect with Us!
https://twitter.com/lpl
http://www.youtube.com/user/lplfinancialllc
https://www.linkedin.com/company/5294
https://www.facebook.com/LPLFinancialLLC

LPL Financial Media Contact
Amanda Keating
(202) 741-5571
akeating@gloverparkgroup.com

Read the full story at http://www.prweb.com/releases/2014/11/prweb12334337.htm

News Provided by Acquire Media