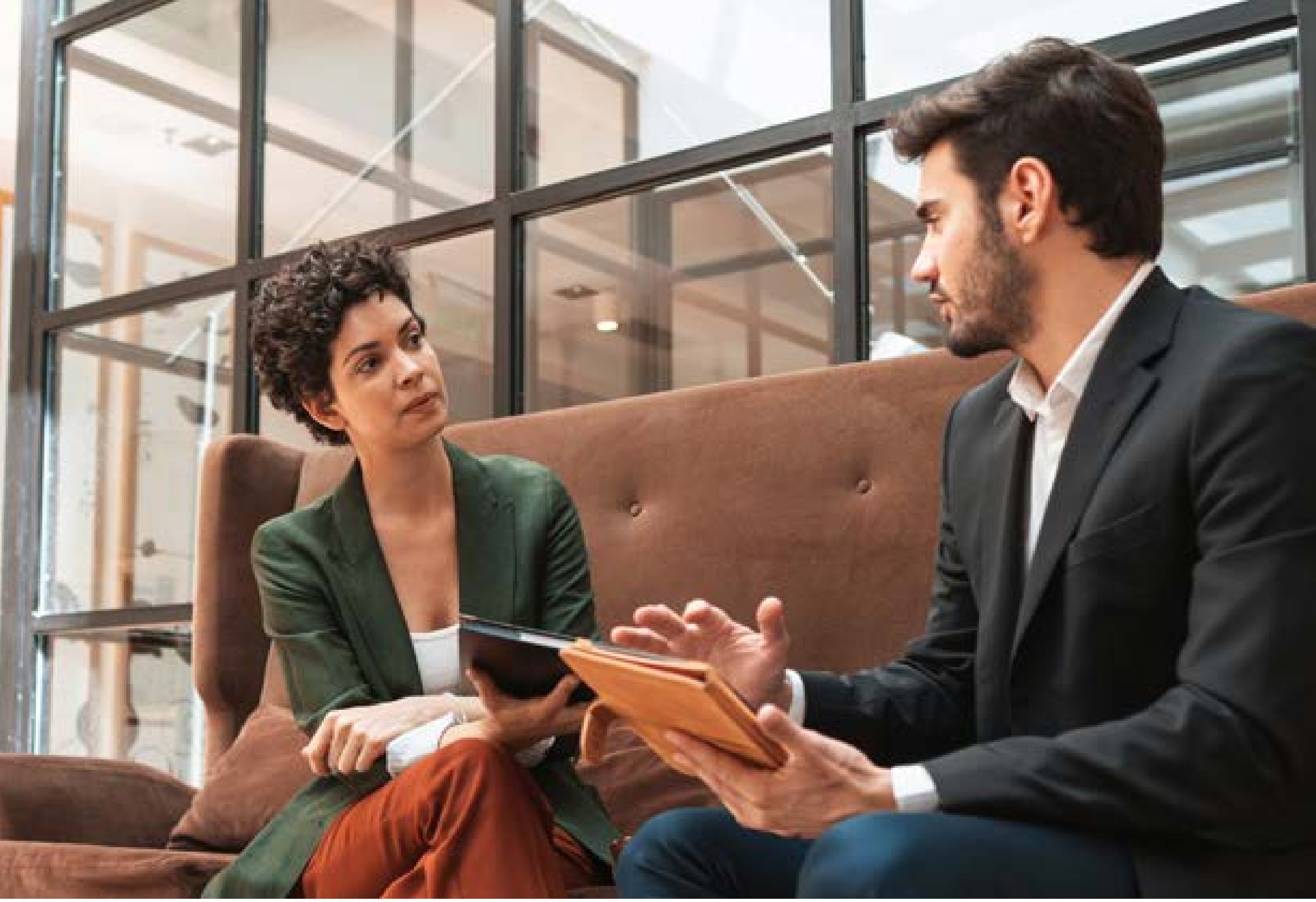
LPL RESEARCH

Guidance for Investors

Activate the Tools of the Trade

Expertise, analysis and insights to help fuel your goals

LPL Financial



Doing the heavy lifting for your financial professional means they can:

Spend more time with you

Offer you compelling products

Position you to pursue your goals

Investment Support on Every Level

LPL Research is dedicated to ensuring your financial professional has what they need to help work toward the outcomes you deserve. Here, over 400 years of combined investment experience comes together as one to deliver market expertise, rigorous analysis, and valued insights. You'll see this at work in several key ways.

Timely market and economic insights

Stay informed with a publication lineup that moves as quickly as the market, and layers in the team's recommendations.

You can drill down with daily and weekly commentary or zoom out with monthly or bi-annual content. Even better, content is published in a variety of formats like articles, podcasts, and videos. Whatever you choose, you're in the know.

Stringent investment review

When it comes to finding and stress-testing products, LPL Research has your financial professional covered. From mutual funds to exchange traded funds and separately managed accounts, our team puts the universe of investment managers and products through rigorous and ongoing analysis.

Your financial professional isn't the only one relying on this data. We do too as the same data drives our decisions for the model portfolios we manage.

Model portfolio management

As part of the charge to help your financial professional work toward your goals, the LPL Research team creates and manages our own model portfolios.

And if your financial professional builds and manages their own model portfolios instead? We're all in to help if they want. Because at the end of the day, our goal is about helping them bring your goals to life. That flexibility is the secret sauce behind LPL – why advisors partner with us.

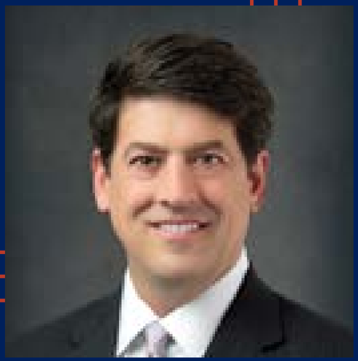
Leadership – an all-star cast

With LPL Research, your financial professional has hands-on access to some of the brightest investment minds in the business. Coming together to create deep bench strength across a spectrum of investment disciplines, LPL Research leadership is well-respected across the industry for their expertise, thought leadership, and perspectives.

How's the idea of strength working? LPL Research is built to provide guidance. After all, when we are stronger, so are you.

LPL Research in action*

$96.6B	50
Assets managed	Model portfolios managed across LPL's advisory platforms



We're driven by the goal of providing compelling risk-adjusted returns.

– Garrett Fish
Head of Model Portfolio Management

* As of 12/31/2025

To learn more about LPL Research:
Contact your financial professional or visit lpl.com

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 nearly 29,000 financial advisors and the wealth management practices of approximately 1,100 financial institutions, servicing and custodying approximately $1.9 trillion in brokerage and advisory assets on behalf of approximately 7 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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