

UNLOCK THE POWER OF PARTNERING

High-performing LPL advisors partner to solve their biggest business challenges: growth, scale, and profitability. Here are the top tasks your peers are delegating to meet their goals and achieve success on their terms.



BUSINESS GOAL Create clarity & focus

Top 5 tasks your peers are delegating

- 1 Setting goals and ensuring accountability
- 2 Budgeting, cash flow stress-testing, and forecasting
- 3 Reviewing their client service model
- 4 Consulting on merger and acquisition (M&A) trends and potential deals
- 5 Segmenting their book of business

43%

of LPL advisors say growing their business is among their top challenges¹



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The top two challenges financial organizations have faced or are facing with M&A transactions are due diligence and valuation and transaction readiness²

Here's how we can help

Get a dedicated CFO who will provide insights, drive execution, and serve as a trusted accountability partner. With CFO Solutions, you get the strategic support you need at every stage of your business life cycle.



FACT:

On average, CFO Solutions subscribers grow 30% faster than non-subscribers.³



BUSINESS GOAL Acquire new clients & deepen client relationships

Top 5 tasks your peers are delegating

- 1 Creating and managing social media profiles to amplify brand
- 2 Publishing regular posts on social media such as X (formerly known as Twitter), LinkedIn, and Facebook to share news and perspectives and increase engagement
- 3 Building social media campaigns
- 4 Publishing blogs on a consistent basis
- 5 Developing and sending mass email campaigns

> 41%

of LPL advisors rank marketing efforts as a top challenge⁴



2x

The top 10% of LPL advisors spend approximately twice as much on marketing and business development as their peers⁴

Here's how we can help

Sharpen your message, amplify your brand, reach a more targeted audience, and connect more meaningfully with every contact to achieve your goals with Marketing Solutions.



FACT:

In 2022, Marketing Solutions subscribers grew their assets 36% more than their LPL peers.⁵



BUSINESS GOAL Reduce administrative burden

Top 5 tasks your peers are delegating

- 1 Scheduling meetings and managing calendars
- 2 Maintaining customer relationship management (CRM) and client segmentation
- 3 Opening accounts, including data collection
- 4 Account cleanup tasks, including householding, review of accounts with large cash positions, review of accounts with debits, review of accounts for conversion to advisory within ClientWorks
- 5 Optimizing workflows

32%

of LPL advisors say not having enough time is one of their top challenges¹



11 hours per week

Average amount of time advisors spend on administrative duties—that could be spent with clients⁶

Here's how we can help

With Admin Solutions, you get an LPL-trained administrative professional, backed by a support team, so you can apply your effort where it matters most—delivering extraordinary value to your clients.



TIP:

At the start of a new year, an LPL-trained administrative professional can help you prepare for client meetings, client reporting, 1099 mailings, tax season, and IRA contributions.

POWER YOUR BUSINESS BY PARTNERING

Discover how you can partner with LPL Business Solutions to achieve the growth, scale, and profitability you want on your terms.

Learn more about:

Ready to talk?

CFO Solutions

Schedule a call

Marketing Solutions

Admin Solutions

¹ LPL Financial study, Voice of Customer Survey, 2023

² Deloitte, 2024 Investment Management Outlook

³ LPL, Data for advisors using the CFO Premium solution. Typically, in the first quarter the advisor joins CFO Solutions, the CFO runs a valuation based on the previous year to set a baseline. Valuations are then conducted annually while the advisor stays in the program. Advisors in CFO Solutions for three years generally have four valuations and demonstrate a 29% total average annual increase in business valuation. Individual results may vary. Past performance does not guarantee future results.

⁴ LPL Financial study, Build Your Extraordinary Business, July 2023

⁵ LPL 2022 data shows currently subscribed LPL advisors controlled for AUM, Age, Tenure and Advisory percentage.

⁶ Cerulli, "U.S. Advisor Metrics 2022"