

# CORPORATE SNAPSHOT



**Financial Resources Group**  
Investment Services  
*Your Financial Advising Journey in Motion*

## INDEPENDENCE POWERED BY LPL FINANCIAL

WE ARE LPL FINANCIAL'S  
**LARGEST** ENTERPRISE BY:



- **ASSETS**  
(BROKERAGE & ADVISORY)
- **TOTAL REVENUE**  
(2024)
- **AFFILIATED PROFESSIONALS**

LPL FINANCIAL IS AN  
INDUSTRY **LEADER**:

- #1** **INDEPENDENT BROKER/DEALER**<sup>1</sup>
- #1** **MARKET SHARE**  
(AMONG 3RD PARTY PROVIDERS OF BROKERAGE SERVICES TO BANKS AND CREDIT UNIONS)<sup>2</sup>
- FORTUNE 500 COMPANY**

## NUMBERS AT A GLANCE

**\$60B+**  
ASSETS  
(BROKERAGE & ADVISORY)

**\$380M+**  
TOTAL REVENUE  
(2024)

**1,025**  
AFFILIATED PROFESSIONALS

**77**

FINANCIAL INSTITUTION PARTNERS



FOLLOW US ON:

DATA AS OF JANUARY 20, 2025



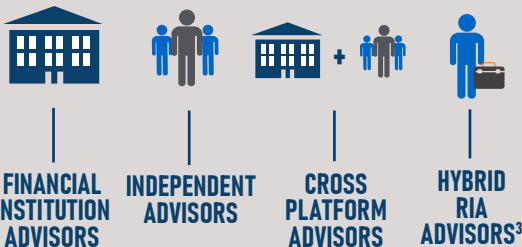
**2010**  
FOUNDED

CORPORATE HEADQUARTERS

## 10 PERSONALIZED SERVICES PROVIDED

- ▶ ADVISOR DEVELOPMENT
- ▶ ADVISOR & INSTITUTION TRAINING
- ▶ BUSINESS DEVELOPMENT, RECRUITING & CONSULTING
- ▶ COMMISSIONS & ACCOUNTING
- ▶ COMPLIANCE & SUPERVISION
- ▶ M&A & SUCCESSION PLANNING CONSULTING
- ▶ MARKETING & DESIGN
- ▶ ONBOARDING & TRANSITION SUPPORT
- ▶ TECHNOLOGY CONSULTING
- ▶ VIRTUAL ADMIN SERVICES

## PROUDLY SERVING

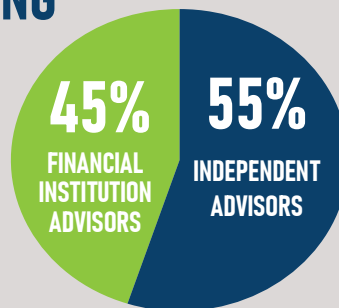


FINANCIAL INSTITUTION ADVISORS

INDEPENDENT ADVISORS

CROSS PLATFORM ADVISORS

HYBRID RIA ADVISORS<sup>3</sup>



PERCENTAGE OF TOTAL GDC

1. As reported by Financial Planning magazine, June 1996-2023, based on total revenue  
2. 2024/2025 Kehler Research Annual Industry Checkup Based on market share of AUM, revenue and advisors.  
3. Hybrid RIA services provided by Gladstone Institutional Advisory.

Securities and advisory services offered through LPL Financial, Member FINRA/SIPC and a Registered Investment Advisor. Financial Resources Group Investment Services, LPL Financial and Gladstone Institutional Advisory Member FINRA/SIPC, are separate entities.