



FRGIS Key Contacts

For more details or specific contact information, please refer to the Advisor Resources Pages on our website: <https://financialresourcesgroup.net/advisor-resources/>
Password: FRGISresources

Team	When to Reach Out	Contact information
FRG Service Team 92	Day-to-day operational questions or escalations: <ul style="list-style-type: none">- New Accounts- Move Money- Account Transfers- Direct Business- Managed Account- Trading- Financial Planning- Retirements & Estates- Financial Planning- LPL Technical Support- Insurance- Compliance & Registrations	(866) 321-3640 Speak: "Financial Resources Group" or "FRG"
FRG Business Consultant	Strategic conversations regarding your practice: <ul style="list-style-type: none">- Growth- Solution Sharing- Biz Dev- Practice Management- Analytics Modeling- Succession Planning- P&L Considerations- Process & Efficiency Review- Policy/Procedure Updates	Contact your Business Consultant
FRG Training	One-on-one or group training: <ul style="list-style-type: none">- New Account Opening- Account Transfers- Move Money- Account Maintenance- Householding- CRM- iDoc- Trading- Annuity Order Entry- OnceHub- Proposal Generation- MyRepChat- Performance Reporting- Financial Planning	Training@lplatfrg.com Scheduler: https://go.oncehub.com/FRG-Training
FRG Operations	<ul style="list-style-type: none">- Branch Changes- Status/Role Changes- Terminations- Rep Maintenance (moving accounts between advisors)	Contact your Business Consultant



Team	When to Reach Out	Contact information
FRG Compliance	<ul style="list-style-type: none">- LPL Compliance-related issues & requirements- Paperwork and Signature Requests- Compliance Flags- Advisory Compliance- Policies & Procedures- Continuing Education- Audit Prep	OSJ@lplatfrg.com Scheduler: https://go.oncehub.com/FR-GOSJ
FRG Marketing	<ul style="list-style-type: none">- Brand Development- Website Consultation- Advertising- Social Media Strategy- Advertising Review Tool (ART)- Content Creation- Email Marketing- Graphic Design- Lead Generation	Marketing@lplatfrg.com
FRG Advisor Development, M&A, and Succession Planning	<ul style="list-style-type: none">- Practice Acquisitions- Succession Planning- Early Career Advisor Development	William.Brice@lpl.com Scheduler: https://go.oncehub.com/williambrice
FRG Commissions	<ul style="list-style-type: none">- Commission Questions- Commission Statements	Commissions@lplatfrg.com
FRG Tech Support	<ul style="list-style-type: none">- Hardware/Equipment- Troubleshooting Tech Issues- Equipment Security	IT@lplatfrg.com Scheduler: https://go.oncehub.com/FRGIS-IT
FRG Onboarding & Integration	<ul style="list-style-type: none">- Adding Licensed or Non-Licensed Staff	Onboarding@lplatfrg.com
FRG Recruiting	<ul style="list-style-type: none">- Sourcing Advisors to join your practice- Referring Advisors to join FRG/LPL	jj.hudock@lpl.com 704.816.8022