

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/DEALER¹**

#1

MARKET SHARE
(AMONG 3RD PARTY PROVIDERS
OF BROKERAGE SERVICES TO
BANKS AND CREDIT UNIONS)²



FORTUNE 500 COMPANY



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**



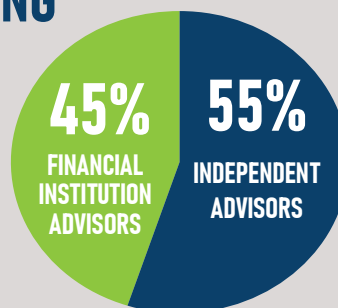
**INDEPENDENT
ADVISORS**



**CROSS
PLATFORM
ADVISORS**



**HYBRID
RIA
ADVISORS³**



PERCENTAGE OF TOTAL GDC

NUMBERS AT A GLANCE

\$60B+

ASSETS
(BROKERAGE & ADVISORY)

\$380M+

TOTAL REVENUE
(2024)

1,887

AFFILIATED PROFESSIONALS

74

**FINANCIAL INSTITUTION
PARTNERS**



FOLLOW US ON:



DATA AS OF JANUARY 20, 2025

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.