CUSTOMIZED REAL ESTATE GUIDANCE & EXECUTION

Develop an office space that fits your vision.

LPL Financial
Strategic Wealth Services

YOUR OFFICE. YOUR FIT. OUR GUIDANCE.

Whether you're looking to break away from your current situation or reimagine your business, LPL Financial is here to help you create your perfect fit. Our Strategic Wealth Service team brings expertise and in-depth knowledge to build your ideal office—and save you time throughout the process. You'll have a partner alongside you every step of the way—from learning about you and your needs to facilitating the construction done by contractors. All this, and you may also be able to launch with little or no out-of-pocket costs.

Our support includes:

- **Discovery and ideation:** We'll get to know you and your team, and understand your requirements and vision for how you want the space to look and feel. In addition, we'll consider the experience you want your clients to have.
- **Presenting and pursuing options:** We work with you to identify office space options, narrow down the best, and pursue your top selections.
- **Planning and design:** We plan your space by building out a floorplan, which will include furniture, lighting, and other functional and design elements.
- **Managing and negotiating:** We strategically manage the real estate procurement and setup process, including submitting a letter of intent, negotiating lease terms, gathering quotes, and managing construction details.
- **Incorporating technology:** We'll hand select and install a robust technology suite consistent with your needs so that you're equipped to run an efficient practice.

Creating unique office experiences

We know that the atmosphere and functionality of your office are important for your staff and your clients. It requires careful planning and a thoughtful approach to designing your space. We'll help you create a space that reflects your values, engages and motivates your staff, and helps you cultivate even deeper connections with your clients.

“Having that professional team to help us with every step was invaluable… They had a vision for it that we couldn’t immediately see.”

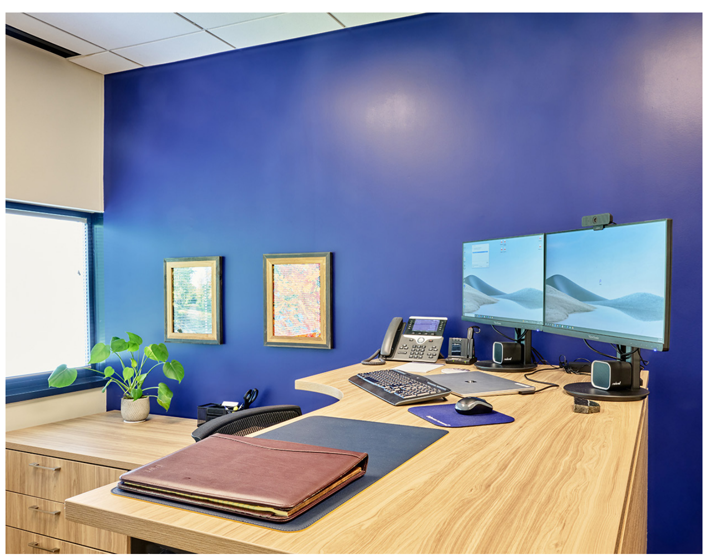
–Leslie Shenkler, Managing Partner, Wealth Advisor

Warm and inviting—the Alcove way

Advisors Daryl Lipkin and Leslie Shenkler, who cofounded Alcove Private Wealth in 2022, sing the praises of Strategic Wealth Services. It started with the firm’s new marketing, in which they went through a DBA naming and branding process. They landed on “Alcove” because they forge deep relationships in a private and intimate way. Once the name and brand were chosen, they took that same thinking into the search for office space, wanting a unique building that projected professionalism as well as a warm, inviting, and secure environment. LPL helped them find their perfect fit.

Home away from home

A walk into Alcove will have you feeling right at home. With the Strategic Wealth Services team's help, the office was furnished and designed to be comfortable and provide a lot of open space. Lipkin and Shenkler say that they've had nothing but positive feedback from clients, many of whom bought gifts for the office to contribute to the overall hospitality.



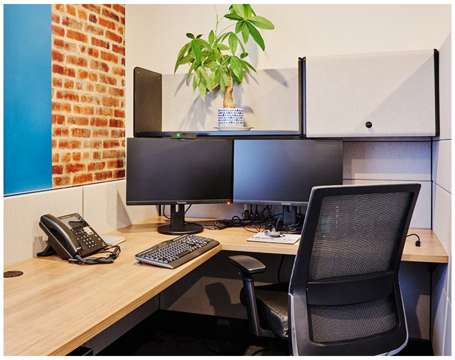
"We took a lot of time and looked at a lot of different locations. Our team at LPL helped us get a sense of what was available and what might work best for the environment we wanted to create—from the building itself to the decorations and furnishings."

–Daryl Lipkin, Managing Partner, Wealth Advisor

Old space, meets new updates

Joining Strategic Wealth Services gave River's Edge Wealth Partners a lot more freedom, flexibility, and support. The team's office space reflects that. River's Edge CEO Tony Frigoletto said he was excited he and his team found a distinctive space—an old schoolhouse. The space brings new and old together, blending the firm's modern design and technology with the original brick walls and gym floor. It's a space he couldn't have had at his wirehouse firm, where office spaces were always "vanilla."

"You go to Strategic Wealth Services because you're looking for someone to really shoulder the burden and effort around the transition...especially when you do the pro formas and weigh the costs of what it takes to hire that sort of liaison. The team did everything I expected them to do—I felt heard, and they got everything right."
–Tony Frigoletto, CEO and Owner



"I'd say to anybody considering going independent that working with Strategic Wealth Services is an opportunity to show your true self instead of having clients meet you at the most convenient, generic, boring building possible."
–Tony Frigoletto, CEO and Owner

Team insights and client reactions

The entire River's Edge Wealth Partners team played a role in the real estate process, from CEO Tony Frigoletto to family dog and Chief Executive Pawficer Louie Adler-Frigoletto. According to Frigoletto, LPL's real estate team helped to provide invaluable insights and gave them ownership of the final product. And, it seems to have worked. He constantly hears compliments from clients, who say the space is cozy and unique.

Own it

Some firms provide office space to advisors, but hold the lease. LPL is different. Once your office build-out is complete, you own it, putting you in complete control.

The Strategic Wealth difference

Our real estate offering is just a small part of a comprehensive support system that delivers you elevated service so you can focus on clients rather than daily business logistics. While your office space is being renovated or built, your dedicated Strategic Wealth Services marketing team will partner with you to develop your brand including your firm name and logo—all of which will be a reflection of your values. In advance of your office launch, we'll ensure your office signage, along with your digital presence and client communications are ready on day one. Then we'll continue working together as you plan your ribbon cutting, open house, or other client engagement events. In addition to start up and real estate support, you'll have access to our legal, HR, technology, and growth teams, all of who will consult with you so you can confidently move forward.

Let's chat

Strategic Wealth Services is well equipped to provide customized business management support through the start up, transition, and ongoing life of your business. To learn more, reach out to your Business Development consultant for a confidential conversation.

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