Expanding Your Team is Now in Reach

Many advisors recognize the value of bringing a new advisor into their organization, but often lack the tools and resources to assess potential candidates —or once hired, the time to train them for lasting success. That's where LPL's Advisor Institute comes in.

Training programs to expedite the growth of new advisors

When a new advisor joins your team, our comprehensive training and development programs will give them the jump-start they need, so they can get further, faster —and help your practice thrive! A variety of programs are available for new advisors, non-licensed personnel, as well as established advisors who are looking to enhance their skills.

To learn more, visit:
lplbusinesssolutions.com/solutions/advisor-institute

Current program options

Licensing

In this program, new advisors gain the knowledge necessary to help pass their Securities Industry Essentials (SIE), Series 7 Top-Off (S7TO), and Series 66 (S66) registrations to become fully licensed.

LPL Core Skills

The LPL Core Skills Program provides advisors with foundational financial knowledge, prospecting strategies, client needs assessment, business planning skills, and comprehensive product and technology training.

Institutional Mastermind

This program is specially designed to support advisors working at financial institutions. Over six mastermind group sessions, you will learn best practices from seasoned instructors and subject matter experts on ways to partner with branch sales and service teams to grow your business, increase client satisfaction, and maximize referral opportunities.

CFP® Certification programs

Becoming a CFP® professional can accelerate success. Two certification program options are currently available, including a fast-track option that will have advisors ready to take the CFP® exam in approximately 8 months.

Fee Waiver

The cost of bringing on a new advisor is a challenge for many independent firms. This program can assist by giving new advisors time to grow production revenue and have LPL fees waived if NNA targets are hit.

LPL Financial