

EXECUTIVE BIOGRAPHY



Burt White

*Managing Director
Investor and Investment Solutions
Chief Investment Officer*

As managing director of Investor and Investment Solutions and chief investment officer, Burt White is responsible for fostering the development and evolution of LPL Financial's capabilities to effectively deliver solutions to support advisor efficiency and growth. Mr. White leads the corporate strategy team responsible for facilitating the firm's strategic direction and innovation work. In addition, he sets the vision for superior research capabilities, and oversees product and platform optimization, marketing support, data analytics, and growth initiative development.

Mr. White is regularly sought after to speak to the national media—including *CNBC*, *Fox Business*, *Bloomberg*, and others.

Prior to joining LPL in November 2007, Mr. White served as a managing director and director of research for Wachovia Securities for 10 years. Mr. White also was an investment analyst for Mercer Investment Consulting, where he provided investment advice to institutional clients. He started his financial services career on the buy side of the business as a research analyst for Thompson, Siegel, and Walmsley, a value-oriented asset manager.

Mr. White received a Bachelor of Business Administration from the College of William & Mary, and is FINRA Series 7, 24, 63, 65, and 87 registered through LPL.