

TRANSITIONING TO LPL

YOUR GUIDE TO LPL TECHNOLOGY

LPL Network

You will initially work in a hybrid environment on both Waddell & Reed and LPL systems. However, over the next few months, most customers, data, and staff will be fully transitioned onto LPL systems.

📅 April 23

Deadline to enable access to LPL's applications. LPL will be sharing instructions in advance.

📅 May 3

Your new LPL network log-in will become active.

📅 Week of May 3

You will receive information regarding your new LPL applications.

📅 Early August

You will receive information on how to return your existing Waddell & Reed hardware.

Email

At first, you will continue using your Waddell & Reed email account for activities related to serving wealth management customers. You will rely on your LPL email account to receive information from LPL, including updates from Human Capital, Training, and other LPL teams.

📅 May 3

You will be able to access your new LPL email address.

📅 End of July

You will fully migrate to LPL's email system. Up to three years of your historical Waddell & Reed email, contacts, and calendar entries will be migrated to your LPL email account.

Shared Drives

You will continue to have access to your Waddell & Reed shared drives, and you'll receive access to additional shared drives at LPL. LPL will provide instructions for transferring materials from Waddell & Reed as well as guidance on Teams, SharePoint, and SharePoint Online.

📅 End of July

The systems conversion will be complete. Access to your Waddell & Reed shared drives will be removed and you will be able to rely solely on your LPL shared drive.

Applications

Your access to Waddell & Reed's wealth management-related applications will remain in place until the conversion to LPL systems is complete in late July. You will be trained on LPL applications and platforms in advance, so when you fully transition you will already know how to navigate LPL's application environment.

Web Conferencing

For virtual communication, you will use the WebEx platform to enable face-to-face interactions with your team and clients.

May 3

You will begin using LPL's WebEx to schedule and attend future conferencing meetings.

Hardware

You will initially continue using your Waddell & Reed hardware (i.e., laptop). While still using your original hardware, LPL will send you a new laptop including instructions to familiarize yourself prior to the conversion.

June/Early July

You will receive a new LPL laptop along with instructions.

Late July

You will continue using your existing Waddell & Reed hardware (laptop or PC) until this time.

Early August

You will receive instructions on how to return your Waddell & Reed hardware.

Remote Access

You will continue to use the Waddell & Reed Global Protect VPN (virtual private network) solution to access the Waddell & Reed network. In addition, you'll see an icon that will grant you access to the LPL network, email, and applications.

May 3

You will receive an icon on your computer that will grant you access to the LPL network.

Printing Access

Once you return to the office, network printing will be available on the fourth floor of the 6301 building. LPL will continue to share updates with you on how they are thinking about the return-to-office process.

Help Desk

If you have questions regarding your Waddell & Reed technology, please contact the Waddell & Reed help desk at (800) 366-4673. If you need support with LPL-provided technology or systems, please contact the LPL Technology Help Desk at (833) 958-6565. If you are unsure of who to contact, you can call either help desk and they will connect you with someone who can help.

If you have any immediate questions, please reach out to HRSC@LPL.com.