

# LPL STRATEGIC WEALTH SERVICES

Reap the rewards of *owning* your business, without the burdens of *running* the business

Owning your own business can be incredibly rewarding. At the same time, all of the decisions and responsibilities required to run a business can be overwhelming. Many questions will likely run through your mind, for example:

How do I make sure I'm budgeting correctly for all monthly expenditures?

Do I need to hire more support staff to help with administrative tasks?

How will I manage all of my vendors, suppliers, and partners?

Will I need a marketing strategy to ensure I keep growing?

And most critically, how do I make sure I'm able to spend my time where it counts—in front of my clients and prospects?

LPL Strategic Wealth Services is the only fully integrated solution designed to help you with every step of the move to independence, from real estate to IT to marketing. Once you've transitioned to independence, you will be partnered with a seasoned management team to help you continue to thrive. Hands-on services and proactive support built upon and integrated with LPL's all-inclusive custody and clearing platform, so you can focus on what you do best—and what you really love: taking care of clients.



Financial Advisors benefit from the strength of LPL's relationships, expertise, tools, services, and end-to-end support to run an efficient, profitable, and growing practice all for a **single service fee**.

Additionally, LPL offers a full range of capital support to facilitate your transition with **no out-of-pocket costs**.



## YOUR RESPONSIBILITY



### Launching Your Business

- Inspiration and approvals
- No out-of-pocket cost



### Ongoing Expense Management

- LPL service fee
- Travel, meals, and entertainment
- Staff salaries and benefits
- Rent and office expenses



## OUR RESPONSIBILITY



### Launching Your Business

- Transition and business startup capital
- Project management and delivery of a turnkey entity, office, brand, and website



### Ongoing Expense Management

- Technology applications
- IT infrastructure and hardware
- Compliance and supervision
- E&O Insurance
- Private client and relationship management consultants
- Outsourced CFO and accounting
- Ongoing social media and marketing services
- Centrally-managed administrative support
- Payroll and benefits administration

LPL Strategic Wealth Services enables you to run *your business, your way*, while we take care of the rest.

**You own it. We run it.**

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