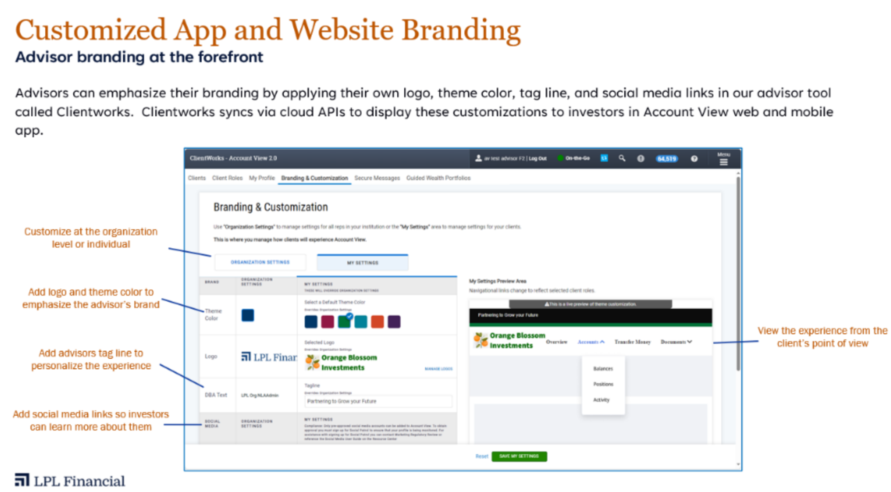
LPL FINANCIAL

INITIATIVE	Mobile App and Website Personalization & Branding
AWARD	Celent Model Wealth Manager 2025 for **Personalization**
EXECUTIVE SUMMARY	Personalization has emerged as a critical differentiator, reshaping how financial services firms engage with clients. As clients become increasingly discerning, they demand tailored financial solutions that reflect their unique needs and preferences. LPL has recognized that their advisors have invested significant time and effort into building their personal brands, which embody their values, expertise, and approaches to financial management. LPL's commitment to empowering these advisors to take center stage in their client interactions is at the heart of their strategy. The shift toward personalization is driven by several factors, including advancements in digital technology, changing client demographics, and evolving consumer expectations. Today's investors, particularly those from younger generations, are accustomed to personalized experiences in various sectors and expect the same level of customization from their financial service providers. This demand compels wealth management firms to prioritize the advisor-client dynamic, ensuring that advisors can effectively showcase their unique offerings while maintaining their brand identity. LPL Financial has developed innovative tools and services that enhance the advisor-client relationship, allowing advisors to communicate their unique value propositions and build deeper connections with their clients. Their client engagement tool, Account View, enables advisors to customize their branding through logos, theme colors, taglines, and social media links, creating a cohesive and personalized experience for clients. This initiative not only reinforces the advisors' identities but also positions them as trusted partners in their clients' financial journeys. As LPL continues to enhance their offerings, they are committed to integrating advanced features that facilitate seamless communication between advisors and clients. By leveraging technology, they aim to provide clients with multiple avenues for engagement, including text messaging, meeting scheduling, and phone calls. Additionally, they recognize the importance of empowering advisors' support staff, ensuring they have the tools necessary to assist in delivering a personalized client experience. LPL's focus on personalization aligns with their broader mission to enhance the overall client experience in the financial services industry. By placing human connection at the forefront of their digital interactions, they are fostering loyalty and trust among clients, which is essential for long-term success. As LPL moves forward, their commitment to championing their advisors' brands and empowering them to thrive in their roles will remain a cornerstone of their strategy, ensuring that they meet the diverse needs of their clients while reinforcing the value of personal relationships in financial advising.

Source: LPL Financial

	In summary, LPL Financial is poised to lead the way in personalized wealth management, equipping advisors with the tools and resources they need to build strong, lasting relationships with their clients. By embracing innovation and prioritizing the advisor-client dynamic, they are setting the stage for continued growth and success in an increasingly competitive market.
LPL Account View Website Personalization and Branding Overview	
KEY BENEFITS	• Improved the experience not only for advisors but also for their clients. • Centered the human experience within a digital platform to deliver unique value in financial services. • Enabled advisors to customize features for each investor, simplifying individual client experiences and reducing questions. • Provided investors with easy access to their advisors if they have questions. • Allowed advisors to proudly showcase their brand within the investor experience, fostering trust and respect from investors.
KEY VENDORS	N/A
READ MORE	Please visit the Celent Wealth Management hubpage on Celent.com to learn more about this initiative.