LPL BY THE NUMBERS

AN INDUSTRY LEADER

1989 LPL was founded in 1989

18K+ Financial professionals serviced

800+ Financial institution partners

FORTUNE 500 Ranked no. 466 on the Fortune 500 List[1]

#1 INDEPENDENT BROKER/DEALER

In the United States[2]

#1 PROVIDER OF

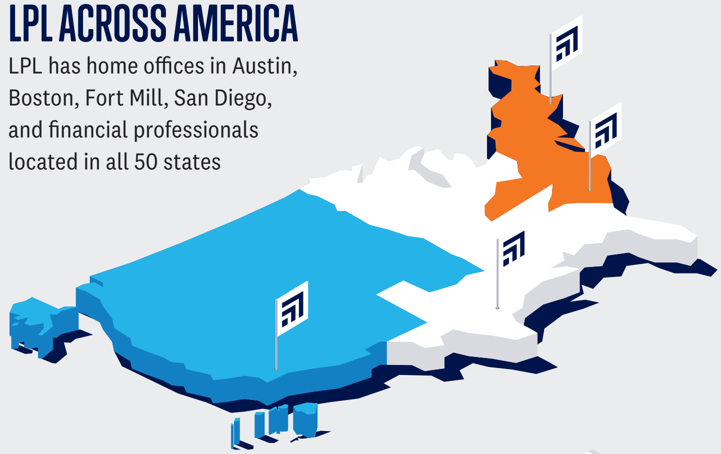
3rd-party investment services to banks and credit unions[3]

#3 RIA CUSTODIAN

In the United States[4]

LPL ACROSS AMERICA

LPL has home offices in Austin, Boston, Fort Mill, San Diego, and financial professionals located in all 50 states



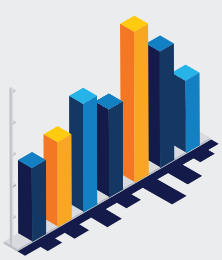
SERVING INVESTOR ACCOUNTS

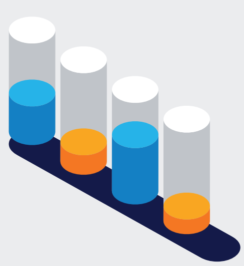
6M Client accounts serviced

$1T Brokerage and advisory client assets, serviced or custodied

24/7 Access to your account information via our mobile app and portal

INVESTMENT OPTIONS TO ADDRESS YOUR NEEDS





ZERO PROPRIETARY PRODUCTS WITH THOUSANDS OF INVESTMENT OPTIONS

Access to a breadth of investment options—from mutual funds to bonds to alternative investments—and fee-based investment programs that the advisors at Candor Wealth Partners can leverage to craft your customized portfolio

Data as of May 31, 2021

1 Fortune 500 ranks U.S. companies based on a review of the prior year's total revenue and factors such as profits after taxes, year-end assets and total stockholders' equity.

2 As reported by *Financial Planning* magazine, June 1996-2021, based on total revenue. 3 2020/2021 Kehrer Bielan TPM Survey. Based on financial institution market share.

4 Cerulli Associates, 2019 U.S. RIA Marketplace Report

LPL.COM

LPL Financial

LPL BY THE NUMBERS

SUSTAINABLE INVESTING WITH LPL

Sustainable investing is investing with the intention of generating a positive ESG impact alongside a financial return. LPL supports the growth and development of sustainable investing practices by providing education, insights, research, and solutions.

157 Sustainable mutual fund options

75 Sustainable exchange-traded fund options

PROTECTION YOU CAN RELY ON

$40M **DEDICATED ANNUAL BUDGET**
We invest in cybersecurity and data privacy to keep you and your data protected from cyberattacks

800 Risk & compliance experts provide you guidance and oversight

100 Cybersecurity experts to keep you and your clients protected

GIVING BACK TO OUR COMMUNITIES

$1.7M In charitable donations in 2020: The LPL Financial Foundation provides direct financial support to charitable organizations, offer matching gifts for LPL financial professional and employee contributions, and coordinate ongoing employee giving and volunteer activities

LPL Financial Foundation

LPL Financial
Strategic Wealth Services

LPL Strategic Wealth Services is the only fully integrated solution designed to help the advisors at Candor Wealth Partners with every step of the move to independence. As part of LPL Strategic Wealth Services, Candor Wealth Partners will be partnered with a seasoned management team to help them continue to thrive. They receive hands-on services and proactive support integrated with LPL's all-inclusive custody and clearing platform, so they can focus on what they do best – and what they really love: taking care of clients.

If you have questions, or want to learn more about about how LPL Strategic Wealth Services will support Candor Wealth Partners, please contact us.

CANDOR WEALTH PARTNERS

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