



## LPL RESEARCH EXPERTISE

# HELPING MOVE YOUR GOALS FORWARD FROM BEHIND THE SCENES

The market is ever moving—so how does your financial professional keep up? The LPL Research team simplifies that effort. Comprised of over 30 industry specialists, this dedicated team provides your financial professional with insights and commentaries so they're positioned to help pursue your goals. Plus, your financial professional has a direct line to the team for advice on investing strategies, portfolios, and more.

## RESEARCH TEAM BY THE NUMBERS



**\$73B+**  
ASSETS  
MANAGED



**11** CHARTERED  
FINANCIAL ANALYSTS

**2** CHARTERED MARKET  
TECHNICIANS



**50**  
MODELS MANAGED ACROSS  
LPL'S ADVISORY PLATFORMS

**8** MASTERS  
DEGREES

**2** SECOND MASTERS  
DEGREES

**2** DOCTORATES



**400+** COMBINED YEARS  
OF INDUSTRY  
EXPERIENCE

**35+** TOTAL TEAM  
MEMBERS

\*As of 3/31/24

**GET TO KNOW YOUR LPL RESEARCH  
LEADERSHIP TEAM: WHO THEY ARE**



**Marc Zabicki, CFA**  
**Chief Investment Officer &  
 Director of Research**  
**Responsible for:** Leading the LPL Research team  
**Years of industry experience:** 30+



**Dr. Quincy Krosby**  
**Chief Global Strategist**  
**Responsible for:** Providing a perspective  
 on global capital markets  
**Years of industry experience:** 27+



**Adam Turnquist**  
**Chief Technical Strategist**  
**Responsible for:** Leading LPL's technical  
 analysis of global capital markets  
**Years of industry experience:** 15+



**Garrett Fish, CFA**  
**Head of Model Portfolio Management**  
**Responsible for:** LPL's investment  
 management process  
**Years of industry experience:** 30+



**Jason Hoody, CFA**  
**Head of Investment Manager Analysis**  
**Responsible for:** Leading the research efforts  
 on third-party investment manager analysis  
**Years of industry experience:** 22+



**Craig Brown**  
**Quantitative Strategist**  
**Responsible for:** Developing systematic  
 multi-asset allocation models and data-driven  
 processes to inform investment decision-making  
**Years of industry experience:** 6+



**Jeffrey Buchbinder, CFA**  
**Chief Equity Strategist**  
**Responsible for:** Developing and articulating  
 equity strategy views  
**Years of industry experience:** 24+



**Lawrence Gillum, CFA**  
**Chief Fixed Income Strategist**  
**Responsible for:** Guiding fixed income strategy  
 within the firm's discretionary model portfolios  
**Years of industry experience:** 24+



**Dr. Jeffrey Roach**  
**Chief Economist**  
**Responsible for:** Relating economic  
 conditions with financial market outcomes  
**Years of industry experience:** 18+



**Thomas Shipp, CFA**  
**Quantitative Equity Analyst**  
**Responsible for:** Leading the quantitative  
 research team and focused on factor-based  
 equity analysis  
**Years of industry experience:** 14+



**Kristian Kerr**  
**Head of Macro Strategy**  
**Responsible for:** Leading the  
 Strategic and Tactical Asset Allocation  
 Committee and developing the LPL overall  
 house investment view  
**Years of industry experience:** 24+



**Jina Yoon, CFA**  
**Chief Alternative Investment Strategist**  
**Responsible for:** Providing strategic view on  
 alternative investments  
**Years of industry experience:** 15+

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