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

50 MODELS MANAGED ACROSS LPL'S ADVISORY PLATFORMS

400+ COMBINED YEARS OF INDUSTRY EXPERIENCE

11 CHARTERED FINANCIAL ANALYSTS

2 CHARTERED MARKET TECHNICIANS

8 MASTERS DEGREES

2 SECOND MASTERS DEGREES

2 DOCTORATES

35+ TOTAL TEAM MEMBERS

*As of 3/31/24

LPL Financial

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+