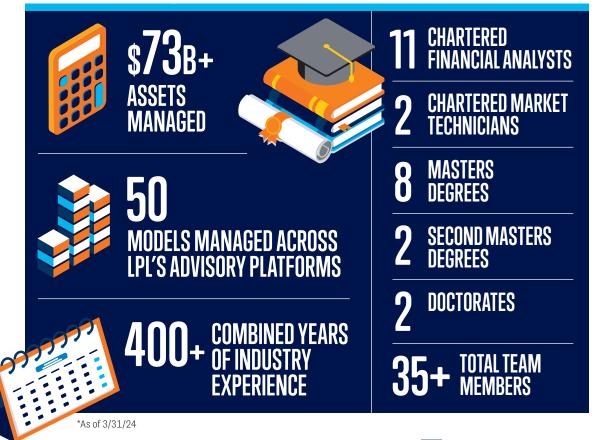


LPL RESEARCH EXPERTISE

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





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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