

Speaking outline for annual conference

Business Solutions Speaking Outline

Segment 16: Business Solutions

I. Open

- a. Call-back to previous segment (Andy) that touched on CFO solutions
- b. Connect that with 4 business solutions, first introduced during last year's show.
 - i. While Jim Miller's example was unique — not many of you are holding down two full-time jobs — the way he leveraged our business solutions applies to all of you
- c. For 40 years, we've helped you be the best financial advisors in the industry. That focus is unchanged, but our strategy for getting there has shifted. We're going to help you achieve that by running the most successful business in the industry.
- d. And that's what LPL Business Solutions is all about.

II. Overview business solutions

- a. Admin solutions
- b. Marketing solutions
- c. CFO solutions
- d. Technology solutions
- e. We call them business solutions, but they're really growth solutions. Here's why ...

III. Growing your business

- a. To be successful today, you need to perform myriad tasks (compliance, marketing, etc.)
- b. These are easily automated by machine, freeing you to grow your business. Digital first; human heart
- c. Our job: help with anything that can be commoditized.
- d. Not an all-or-nothing proposition. Pick and choose what you need based on your capabilities
- e. Results: lower expenses, increased revenue
 - i. Marketing Solutions study of participating advisors over 15 month period (Midas, March 31,2020)
 1. Increased net new assets - \$4M+ per advisor
 2. Increased new clients by 25%
 3. Increased client wallet share by 14%
 4. Reduced client attrition, improved 38%

IV. Case study example(s)

V. Close

- a. Look at your screen, our meeting today ... the world has changed.
- b. If you're waiting months to realize value, you're risking a lot.
- c. You need to be agile, with a breadth of capabilities.
- d. Continuously realizing wins every day.
- e. Our business solutions help you realize those wins each and every day.
- f. Positioning your business for maximum growth and success.