PRIVATE CLIENT SERVICES NETWORK

Specialized services through trusted providers

LPL PRIVATE CLIENT

With increased wealth comes greater complexity—which often requires specialized expertise. For your benefit and consideration, LPL Financial's Private Client Services Network has carefully curated service providers that complement the services and support offered through our firm.

The intent of the Private Client Services Network is to provide you an end-to-end, private wealth management experience, so you don't have to look elsewhere for the services you require. As your trusted advisor, we're here to help you find solutions to the dynamic challenges and opportunities that life presents.

Our carefully curated list of service providers can assist with:

- Investment banking services for the sale, acquisition, or recapitalization of small and mid-sized businesses
- Developing and implementing over-the-counter hedging and monetization strategies for concentrated stock positions
- Business advisory services for sale readiness
- High-end property and casualty insurance
- Specialty lending for aircraft, watercraft, luxury RV, and fine art
- Complex tax services
- Additional specialized services available

SERVICES PROVIDED

Investment Banking

- Sell-Side Advisory
- Buy-Side Advisory
- Employee Stock Ownership Plan (ESOP)
- Debt Capital Advisory
- Equity Capital Advisory
- Infrastructure Finance
- Transaction Advisory
- Interim Management
- Performance Improvement
- Valuation Advisory
- Litigation Support
- Turnaround & Restructuring
- Bankruptcy & Insolvency
- Fairness Opinions
- Special Situations

Business Advisory

- Operational Assessment
- Pricing Study
- Transition Options
- Value Acceleration

OTC Hedging and Monetization

- Covered Call
- Protective Put
- Collar
- Variable Pre-paid Forward

Property and Casualty Insurance

- Auto
- Aviation
- Cyber
- Family Office
- Flood
- Group Personal Excess Liability
- Home
- Liability
- Specialized Coverages
- Workers' Compensation
- Yacht
- Art Advisors
- Medical Resources
- Security Services

Specialty Lending

- Aircraft
- Fine Art
- Luxury RV
- Watercraft

Tax Services

- Tax Planning and Preparation
- Fiduciary/Trust and Estate Accounting and Tax Services
- Family Office Advisory and Outsourcing Services
- Cross-border Tax Advisory
- Estate, Trust and Business Valuation Services
- Digital Tax Solutions and Application

RIGOROUS DUE DILIGENCE

Our selected providers were chosen with intention and care. Providers are only added to our network after in-depth due diligence conducted by LPL Financial. Their inclusion is based not only on the services they provide, but on factors such as longevity and reputation in their respective industries, business structure, advisor support capabilities, and handling of client information.

PERSONALIZED EXPERIENCE

Through the Private Client Services Network, our intention is to deliver a white glove, personalized experience. Together, we will navigate the specialized services available through the program so that you can select the best provider that meets your needs.

GETTING STARTED

If you'd like to learn more about the services and solutions available through the Private Client Services Network, you'll need to complete a few simple forms, so we can begin exploring and interviewing companies with you. Once we've reviewed the options available, we can support introductions to the providers to get started.

LPL Financial