LPL Financial

LPL Financial's Latitude Unifies Technology Built for the Future of Advice

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Secure, resilient, data-driven and AI-embedded technology experience.

SAN DIEGO, July 28, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC today announced LPL Latitude, the company's unified technology experience that connects the firm's capabilities across data, cybersecurity, infrastructure resiliency, artificial intelligence, advisor workflows and end-investor applications.

"LPL Latitude is more than a technology system — it's a strategic investment in the future of advice," said Rich Steinmeier, CEO of LPL Financial. "By creating a unified foundation across our business, we are accelerating innovation, unlocking the power of AI and data, and delivering more seamless, intelligent experiences for advisors and their clients. As the industry evolves, this integrated technology helps ensure our advisors remain at the forefront of delivering exceptional advice."

Over the last three years, LPL has invested nearly $2 billion in building the core pillars of Latitude, including a significant annual increase in cyber protections, reinforcing its commitment to protecting advisors, clients and data at every level. This year, LPL expects to introduce more than **35 major** technology enhancements inside Latitude, representing the largest set of advanced features in the company's history.

"LPL Latitude represents a step-change in how LPL delivers technology to advisors — at a time when expectations around security, personalization and digital experiences continue to rise," added Greg Gates, LPL's chief technology and information officer. "The LPL Latitude experience is agile and designed to scale alongside advisor needs. We're continuing to champion advisors' choice through our ClientWorks connected ecosystem, which leverages third-party applications, all while integrating agentic AI and strengthening protections. As the name implies, Latitude will provide both flexibility and guided direction to help advisors run efficient, secure and successful businesses."

LPL Latitude is anchored in five core strengths:

Connected Data Architecture
LPL's position as a self-clearing, broker-dealer and custodian gives the firm a dynamic advantage in creating one of the most vertically integrated data ecosystems in wealth management — turning information into actionable insight that can improve outcomes. For example, LPL's comprehensive data-driven framework is the foundation of its Advisor Growth System, which helps advisors and institutions benchmark their performance, identify growth opportunities and execute strategic improvements with LPL's support. The Advisor Growth System is available at no cost to LPL advisors and institutions.

Secure, Resilient Infrastructure
Enterprise-grade security is embedded throughout LPL Latitude, supported by increased cybersecurity investments to meet evolving risk and regulatory expectations. Key enhancements include the LPL Business Browser, which strengthens security controls while enabling future AI-powered capabilities; phishing-resistant multi-factor authentication; and data-minimization initiatives that help reduce risk and protect sensitive information. Since the firm started deploying the LPL Business Browser earlier this year, it has blocked thousands of cyberattacks on advisors' systems to date.

Agentic AI, Embedded in Workflows
AI capabilities will be integrated directly into how advisors work — not bolted on — helping reduce friction, automate tasks and guide decision-making in real time. A core asset of LPL Latitude is **Cyan**, LPL's AI agent designed to operate across advisor workflows and deliver contextual, real-time intelligence. Cyan is being built to reduce complexity and unlock advisor capacity — quietly working behind the scenes to surface insights, automate routine tasks and support informed decisions. Initial capabilities will focus on high-impact use cases, including:

- Conversational generative AI for workflow support and guidance
- Agentic automation for account maintenance
- Recommendations for growing an advisor's practice based on performance data
- AI-generated financial planning insights and summaries

These early applications, all of which will launch later this year, demonstrate how AI can enhance — not replace — the advisor enabling more personalized and proactive experiences.

Advanced Advisor Operating System
LPL's ClientWorks advisor operating system is built on a resilient infrastructure and is scalable for incremental innovation. Among the operating system upgrades coming as part of the major enhancements this year, the company plans to launch single client relationship agreements and a mobile app for its operating platform, simplifying the account opening process and supporting

advisors on the go.

Enhanced End-Investor Applications
Account View, LPL's investor digital experience, will expand with new digital capabilities that make it easier for clients to securely access information, complete key tasks and stay connected to their financial plans, including enhanced self-service features such as secure document sharing, income and distribution tracking, integrated eSignature and financial planning connectivity.

At the LPL Focus 2026 conference next month, which is among the largest gatherings of financial professionals in the world, the company plans to feature the core pillars of Latitude including cybersecurity enhancements and demonstrations of Cyan's advanced agentic workflows.

About LPL Financial

LPL Financial Holdings Inc. (Nasdaq: LPLA) is among the fastest growing wealth management firms in the U.S. As a leader in the financial advisor-mediated marketplace, LPL supports more than 32,000 financial advisors and the wealth management practices of approximately 1,100 financial institutions, servicing and custodying approximately $2.3 trillion in brokerage and advisory assets on behalf of approximately 8 million Americans. The firm provides a wide range of advisor affiliation models, investment solutions, fintech tools and practice management services, ensuring that advisors and institutions have the flexibility to choose the business model, services, and technology resources they need to run thriving businesses. For further information about LPL, please visit www.lpl.com/.

Securities and advisory services offered through LPL Financial LLC ("LPL Financial"), a registered investment adviser and broker-dealer. Member FINRA/SIPC.

Throughout this communication, the terms "financial advisors" and "advisors" are used to refer to registered representatives and/or investment advisor representatives affiliated with LPL Financial.

We routinely disclose information that may be important to shareholders in the "Investor Relations" or "Press Releases" section of our website.

Forward-Looking Statements

Certain of the statements included in this release, such as those regarding the expected introduction of operational and technological capabilities and enhancements, and the anticipated benefits of the Latitude platform, including the Cyan AI agent, constitute forward-looking statements. Words such as "expects," "believes," "anticipates," "plans," "assumes," "estimates," "projects," "intends," "should," "will," "shall" or variations of such words are generally part of forward-looking statements. Forward-looking statements are made based on current expectations and beliefs concerning future developments and their potential effects on LPL Financial. In particular, no assurance can be provided that all currently anticipated enhancements will be made this year or at all; that Cyan will launch as anticipated; and that the Latitude platform, including Cyan, will deliver the expected benefits to individual advisors and end-clients. These forward-looking statements are not a guarantee of future performance and involve risks and uncertainties, including economic, legislative, regulatory, competitive and other factors, and there are certain important factors that could cause actual results or the timing of events to differ, possibly materially, from expectations or estimates expressed or implied in such forward-looking statements. Important factors that could cause or contribute to such differences include: difficulties in developing new technologies and integrating them into our business; changes in general economic and financial market conditions, including retail investor sentiment; the effects of competition in the financial services industry and the success of LPL Financial in attracting and retaining financial advisors and institutions, and their ability to market financial products and services effectively; the effect of current, pending and future legislation, regulation and regulatory actions, including disciplinary actions imposed by federal and state regulators and self-regulatory organizations; and the execution of LPL Financial's plans and its success in realizing the synergies, expense savings, service improvements or efficiencies expected to result from its investments, initiatives and acquisitions, expense plans and technology initiatives. Certain additional important factors that could cause actual results or the timing of events to differ, possibly materially, from expectations or estimates expressed or implied in such forward-looking statements can be found in the "Risk Factors" and "Special Note Regarding Forward-Looking Statements" sections included in LPL Financial Holdings Inc.'s most recent Annual Report on Form 10-K. Except as required by law, LPL Financial does not undertake to update any particular forward-looking statement included in this document as a result of developments occurring after the date of this press release.

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