LPL Financial's 2026 Advisor Growth Study Reveals How Top-Performing Advisors Generate Sustainable Growth

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SAN DIEGO, Nov. 18, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC today released findings from its 2026 Advisor Growth Study, revealing that the fastest-growing advisors create sustainable success through growth within their current client base. Although more than 70% of advisors identified new-client acquisition as their top-growth priority, top growers held a nearly 7-percentage-point advantage over the middle 60% in existing-client growth, compared with a nearly 6-point advantage in new-client growth, highlighting that sustainable growth is often driven as much by unlocking potential within existing relationships as by winning new ones.

The comprehensive annual 2026 Advisor Growth Study draws on seven years of structured data (2018–2025) from more than 15,000 financial advisors across business models, geographies and growth stages to examine the relationship between net new assets, revenue growth and advisor growth behaviors. The study identifies the practices that consistently drive strategic, organic growth among advisors and institutions.

The research found that net new assets (NNA) are a leading indicator of sustainable growth, with top-growing advisors[1] generating annual revenue increases more than 14 percentage points higher than advisors with no NNA growth, a trend that held across one-, three- and seven-year periods.

The research also challenges the notion that growth is largely determined by the composition of an advisor's client base. According to the study, 90% of top-grower NNA outperformance was driven by stronger results within comparable wealth and affluence segments rather than differences in client mix. Among advisors affiliated with banks and credit unions, that figure rose to 93%.

"Top-growing advisors build growth rather than borrow it from the market," said Kraleigh Woodford, executive vice president of client enablement and growth at LPL Financial. "They generate more of their results through the relationships and business decisions they can influence, particularly by uncovering opportunities with their existing clients."

Early adopters of LPL's Advisor Growth Index (AGI), a benchmarking and diagnostic tool that helps advisors identify strengths, gaps and growth opportunities relative to peers and top growers, experienced an annualized NNA growth lift of nearly 2% compared with similar advisors who had not yet adopted the tool.

The 2026 Advisor Growth Study builds on LPL's inaugural 2025 research and takes a deeper look at the drivers of organic growth. By examining NNA across client relationships, wealth phases and affluence segments, the study identifies where advisors are generating momentum, where growth may be slowing and where opportunities exist to strengthen business performance.

The complete 2026 Advisor Growth Study is available at https://go.lpl.com/advisorgrowthstudy.

About LPL Financial

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Media Contact:
Media.relations@LPLFinancial.com
(402) 740-2047

Tracking #: 1208946

[1] Top-growing advisors are in the top 20% for NNA growth