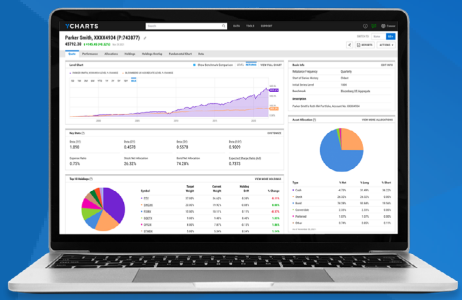
YCHARTS for LPL FINANCIAL AFFILIATES



Enabling smarter investment decisions & better client communications for advisors

As advisors and planners seek to differentiate themselves and effectively communicate their value proposition, creating repeatable, scalable processes for AUM growth can be a challenge. YCharts delivers by streamlining and automating investment research, creating compelling presentation materials, and helping advisors achieve more growth in less time.

"YCharts has the potential to be a tool that lives within every advisor's computer that, in essence, provides them a real-time portal into their portfolios"

Dr. Rob Brown, PhD, CFA,
CIO of Integrated Partners

→ **Learn how YCharts can benefit you**

Ready to Learn More?

Attend a LPL Affiliates round table session to see YCharts in action and hear from colleagues who are already using the tool.

Learn More

YCharts for LPL Financial Affiliates

- Access SAM/SWM fund lists in the YCharts Fund Screener
- Customize reports and other visuals with firm branding, logos & colors
- Automate day-to-day tasks so you can focus on growth

What YCharts Can Do For You

- Create compelling and visually appealing portfolio reports and side-by-side comparisons to support asset growth
- Compare your client and model portfolios against any security, portfolio, index, hypothetical strategy, or custom benchmark
- Answer client questions on the fly with dynamic charts and comparative data tables
- Foster a collaborative work environment by sharing insights, talking points, watchlists, and research with your team
- Proactively address compliance needs across your organization utilizing FINRA-reviewed reports with custom disclosures and branding
- Generate smarter investment ideas and document due diligence by screening the universe of securities or jumpstarting your research with prebuilt templates

Not already a YCharts client?

→ **Schedule a Demo**　→ **Start a Free Trial**　→ **Learn More**　✉ **lplsales@ycharts.com**