

**FOR IMMEDIATE RELEASE**



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**LPL FINANCIAL INVITES JIM PLATANIA  
TO PARTICIPATE IN THE FIRM'S INVESTOR & ANALYST DAY**

**ARLINGTON HEIGHTS, IL — June 18, 2019** – Jim Platania, an independent financial advisor at Platania Financial Inc. in Arlington Heights, IL, served as one of three advisor panelists at LPL Financial's 2019 Investor & Analyst Day on May 22 in New York City.

LPL Financial Holdings Inc. (Nasdaq: LPLA) hosted the event to provide an overview of the company's recent successes, future strategy, innovations, technology and the creation of shareholder value. Members of the advisor panel, including Platania, shared their unique perspectives on the value they—and their clients—realize from their affiliation with LPL Financial.

"They [LPL Financial] execute on what they say and they walk the talk, and I've seen it for 11 months. We couldn't be happier with making the move," said Platania, who joined LPL Financial last June after spending 27 years with another broker-dealer. "I thank the leadership for their forward thinking and execution. When they say something, it gets done." Platania cited LPL's back-office efficiencies and enhanced technology platforms as key drivers in his decision.

"Jim demonstrates every day how our partnership makes a difference in how he is able to successfully manage and grow his business, and how that association makes a difference in the lives of his clients every day," said panel moderator Andy Kalbaugh, LPL Financial managing director and divisional president, National Sales and Consulting. "Jim brought LPL's strategy, technology and culture to life for the Investor and Analyst Day audience, and we thank him for the work he does to demonstrate the value of the independent advice model and his commitment to delivering objective, personalized advice."

A copy of the Investor and Analyst Day presentation is available to the public at [investor.lpl.com](http://investor.lpl.com) under the Events tab. A [webcast replay](#) is also available, including the panel featuring Platania.

Jim Platania is based in Arlington Heights, IL, and provides a full range of financial services, including retirement and financial planning.

LPL is a leader in the retail financial advice market, providing resources, tools and technology that support advisors in their work to enrich their clients' financial lives.

**About Platania Financial Inc.**

Platania Financial is a family-run business that partners with their clients. The firm was founded by Jim Platania, Sr. in 1991.

As CFP® and AIF® professionals, Jim Platania, Sr. and Jim Platania, Jr. bring several decades of experience to clients. By taking a practical, no-nonsense approach to financial planning and asset management, they provide clients with the education and guidance to confidently pursue their most cherished goals

**About LPL Financial**

LPL Financial is a leader in the retail financial advice market and the nation's largest independent broker-dealer\*. We serve independent financial advisors and financial institutions, providing them with the technology, research, clearing and compliance services, and practice management programs they need to create and grow thriving practices. LPL enables them to provide objective guidance to millions of American families seeking wealth management, retirement planning, financial planning and asset management solutions. [LPL.com](http://LPL.com)

\*Based on total revenues, *Financial Planning* magazine, June 1996-2018

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