

FOR IMMEDIATE RELEASE



**APPLIED
FINANCIAL
PLANNING**

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**William C. O'Connor, CFP®, EA Recognized by LPL
Financial as a Top Financial Advisor**

Irvine, CA — February, 2017 — William C. O'Connor, CFP®, EA, an independent LPL Financial advisor at **Applied Financial Planning** in **Irvine**, today announced that **he** was recognized as a top LPL Financial advisor and named to LPL's **Chairman's Club**. This premier award is presented to **less than 5%** of the firm's approximately 14,000 advisors nationwide.

"On behalf of LPL, I applaud **Bill** for earning this distinction and thank **him** for the contributions **he** has made to **his** clients, LPL and the financial services industry," said Andy Kalbaugh, LPL managing director and divisional president, National Sales and Consulting. Bill's success is reflective of the value he has created with his clients by delivering independent financial advice and a robust service offering to help them work toward their financial goals. We are proud to support **Bill** and wish **him** continued success."

O'Connor has been providing financial services to clients in **Orange County** for **30 years**. **O'Connor** provides a **full range of financial services, including retirement and financial planning, tax planning and preparation, individual money management, individual stocks and bonds, mutual funds, annuities and more.**

O'Connor is an LPL Financial-affiliated advisor. LPL is a leader in the retail financial advice market and provides resources, tools and technology that support advisors in the delivery of personal, objective financial advice.

About Applied Financial Planning

The Money Guys is an ensemble team of experienced financial and tax professionals at Applied Financial Planning, an independent, objective investment practice based in Irvine, Calif. Applied Financial Planning gives your future direction by providing the know-how and personal attention as you seek to grow your assets, minimize your taxes and give your future direction. For more information, or to schedule a free initial consultation, call 714-464-4290, email afp@lpl.com or visit www.seekcounsel.com.

About LPL Financial

LPL Financial LLC, a wholly owned subsidiary of LPL Financial Holdings Inc. (NASDAQ:LPLA), is a leader in the retail financial advice market and provided service to \$509 billion in advisory and brokerage assets as of December 31, 2016. LPL is one of the fastest growing RIA custodians and is the nation's largest independent broker-dealer (based on total revenues, Financial Planning magazine June 1996-2016). The Company provides proprietary technology,

comprehensive clearing and compliance services, practice management programs and training, and independent research to more than 14,000 independent financial advisors and over 700 financial institutions, enabling them to help their clients turn life's aspirations into financial realities. Advisors associated with LPL also serviced an estimated 46,000 retirement plans with an estimated \$127 billion in retirement plan assets, as of December 31, 2016. LPL also supports approximately 4,000 financial advisors licensed and affiliated with insurance companies with customized clearing, advisory platforms, and technology solutions. LPL Financial and its affiliates have more than 3,200 employees with primary offices in Boston, Charlotte, and San Diego. For more information, please visit www.lpl.com.

The financial consultants at Applied Financial Planning are registered representatives with, and securities and advisory services are offered through LPL Financial, a registered investment advisor. Member FINRA/SIPC. Financial planning offered through Applied Financial Planning, a registered investment advisor, and separate entity from LPL Financial.

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