

EXECUTIVE BIOGRAPHY



Burt White
Managing Director
Investor and Investment Solutions
Chief Investment Officer

As managing director of Investor and Investment Solutions and chief investment officer, Burt White is responsible for fostering the development and evolution of LPL capabilities to effectively deliver solutions to support advisor efficiency and growth. Mr. White leads the corporate strategy team responsible for facilitating the strategic direction of the firm; sets the vision for superior research capabilities for the benefit of LPL Financial advisors; oversees product and platform delivery and optimization; and manages corporate and advisor-focused strategic functions affecting the growth areas of the organization.

Mr. White is regularly sought after to speak to the national media—including CNBC, Fox Business, Bloomberg, and others.

Prior to joining LPL Financial in November 2007, Mr. White served as a managing director and director of research for Wachovia Securities for 10 years. Mr. White also was an investment analyst for Mercer Investment Consulting, where he provided investment advice to institutional clients. He started his financial services career on the buy side of the business as a research analyst for Thompson, Siegel, and Walmsley, a value-oriented asset manager.

Mr. White received a Bachelor of Business Administration from the College of William & Mary, and is FINRA Series 7, 24, 63, 65, and 87 registered through LPL Financial.