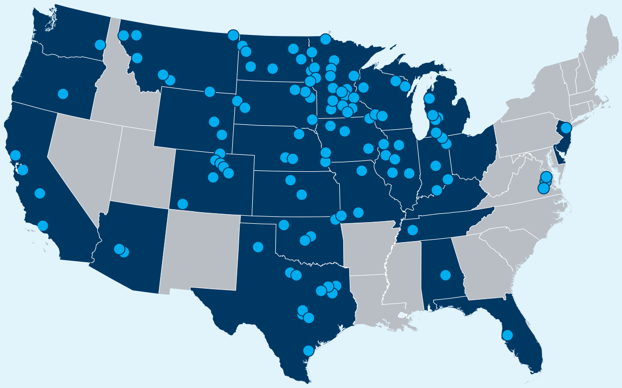
WHO IS THE INVESTMENT CENTER ADVISOR GROUP?

INVESTMENT CENTER
ADVISOR GROUP
BETTER TOGETHER

The Investment Center Advisor Group is comprised of over 350 financial professionals who provide a client-focused approach in working with both clients and prospects in helping to meet their investment and financial needs. The ICA Group provides a variety of solutions and services for your financial professional which includes:

- Financial Solutions Team
- Customized Marketing and Graphic Design Support
- Ongoing Education and Training
- Compliance and Oversight
- Collaborative Peering Networking



These value-add departments allow your financial professional to keep their focus on you in helping to meet your overall goals.

FINANCIAL SOLUTIONS TEAM (FST)

The Financial Solutions Team (FST) is an extension of your financial professionals planning process. FST consists of a team of registered investment professionals that provide independent investment insight which specializes in identifying and prioritizing issues that are uncovered in the profiling and discovery process and then assist in developing and implementing customized strategies that create, maintain and distribute wealth.

Some of the personalized solutions offered by the FST include:

- Retirement Life and Income Strategies
- Risk Management
- Portfolio Analysis
- Cash Flow Analysis
- Tax Planning
- Insurance Analysis
- Medicare/Medicaid Planning
- Long Term Health Care Issues
- Charitable Planning
- Business Succession Planning
- Estate Planning
- Social Security analysis

RELATIONSHIP WITH LPL FINANCIAL

LPL Financial

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The Investment Center Advisor Group partners with LPL Financial, the nation's largest independent broker/dealer, an RIA custodian and leading provider of third-party brokerage services to banks and credit unions. LPL doesn't offer proprietary investment products or engage in investment banking activities; this means your financial professional is not pressured or influenced by LPL to sell its products. They are able to rely on the firm's tools and resources to help them provide financial guidance and recommendations to help address your needs.

LPL FINANCIAL CORPORATE SNAPSHOT

1989
LPL is founded through the merger of Linsco (est. 1968) and Private Ledger (est. 1973).

$5.57B
trailing 12-month gross revenue[1].

16,464
financial professionals[1] and
4,343
LPL employees[1].

Objective Guidance:

LPL's Research team of experts – analysts, strategists, economists, and investment and communications specialists – is focused on delivering objective guidance.

Innovative technology with leading cybersecurity functionality.

Invested over $250 million in 2018 and 2019 in technology.

Recognition:

#1 Corporate Social Responsibility/Diversity[2]

#1 Technology[2]

In a recent survey of affluent investors, LPL Financial ranked #1 for all five drivers of customer loyalty[3]:

#1 Quality of investment advice

#1 Financial stability

#1 Easy to do business with

#1 Range of investment products & services

#1 Retirement planning services

C. Dean Rapp, AAMS
Wealth Manager

ACTIVE
FINANCIAL SOLUTIONS

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[1]Data as of 12/31/19 [2]Source: 2019 WealthManagement.com Industry Awards

[3]Market Strategies International, Cogent Wealth Reports, "Investor Brand Builder™: Maximize Purchase Intent Among Investors and Expand Client Relationships," November 2017.

MSI surveyed 4,408 investors with $100,000 or more in investable assets between June 21, 2017, and August 8, 2017.