



LPL RESEARCH


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# LPL Research Expertise

*Helping move your goals forward from behind the scenes*

The market is ever moving – so how does your financial professional keep up? The LPL Research team simplifies that effort. Comprised of over 30 experts, this dedicated team provides your financial professional with insights and commentaries so they're positioned to help pursue your goals. Plus, your financial professional has a direct line to the team for advice on investing strategies, portfolios, and more.

## Research team by the numbers\*

 <b>\$73.2B+</b> Assets managed	 <b>50</b> Models managed across LPL's advisory platforms	 <b>400+</b> Combined years of industry experience
<b>11</b> Chartered financial analysts	<b>2</b> Chartered market technicians	<b>8</b> Masters degrees
<b>2</b> Second masters degrees	<b>2</b> Doctorates	<b>35+</b> Total team members

\*As of 3/31/24

 LPL Financial

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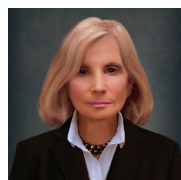
**Marc Zabicki, CFA**  
**Chief Investment Officer &  
 Director of Research**

Responsible for: Leading the LPL Research team  
 Years of industry experience: 30+



**Jeffrey Buchbinder, CFA**  
**Chief Equity Strategist**

Responsible for: Developing and articulating equity strategy views  
 Years of industry experience: 24+



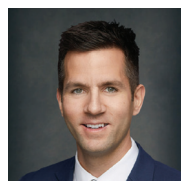
**Dr. Quincy Krosby**  
**Chief Global Strategist**

Responsible for: Providing a perspective on global capital markets  
 Years of industry experience: 27+



**Lawrence Gillum, CFA**  
**Chief Fixed Income Strategist**

Responsible for: Guiding fixed income strategy within the firm's discretionary model portfolios  
 Years of industry experience: 24+



**Adam Turnquist**  
**Chief Technical Strategist**

Responsible for: Leading LPL's technical analysis of global capital markets  
 Years of industry experience: 15+



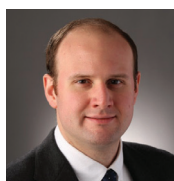
**Dr. Jeffrey Roach**  
**Chief Economist**

Responsible for: Relating economic conditions with financial market outcomes  
 Years of industry experience: 18+



**Garret Fish, CFA**  
**Head of Model Portfolio Management**

Responsible for: LPL's investment management process  
 Years of industry experience: 30+



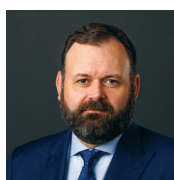
**Thomas Shipp, CFA**  
**Quantitative Equity Analyst**

Responsible for: Leading the quantitative research team and focused on factor-based equity analysis  
 Years of industry experience: 14+



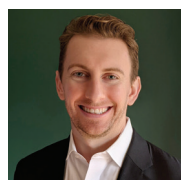
**Jason Hoody, CFA**  
**Head of Investment Manager Analysis**

Responsible for: Leading the research efforts on third-party investment manager analysis  
 Years of industry experience: 22+



**Kristian Kerr**  
**Head of Macro Strategy**

Responsible for: Leading the Strategic and Tactical Asset Allocation Committee and developing the LPL overall house investment view  
 Years of industry experience: 24+



**Craig Brown**  
**Quantitative Strategist**

Responsible for: Developing systematic multi-asset allocation models and data-driven processes to inform investment decision-making  
 Years of industry experience: 6+



**Jina Yoon, CFA**  
**Chief Alternative Investment Strategist**

Responsible for: Providing strategic views on alternative investments  
 Years of industry experience: 15+

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