LPLA April 2021 Monthly Metrics Dashboard

(Posted May 20, 2021)

 Total Advisory and Brokerage Assets
 Assets from WDR - Advisory Assets % Total
 YOY Change Change Assets

 • Total Advisory and Brokerage Assets
 • Assets from WDR - Advisory Assets % Total
 YOY Change Change (Change 11%)

 \$718
 \$746
 \$762
 \$792
 \$823
 \$810
 \$808
 \$873
 \$907
 \$925
 \$958
 \$1,063
 48%
 11%

 \$718
 \$746
 \$762
 \$792
 \$823
 \$810
 \$007
 \$925
 \$958
 \$677
 \$1,063
 48%
 11%

 \$718
 \$746
 \$762
 \$792
 \$823
 \$810
 \$007
 \$925
 \$958
 \$677
 \$1,063
 48%
 11%

 \$48,6%
 48,9%
 49.9%
 50.1%
 50.6%
 51.1%
 51.8%
 \$1,063
 3.2 pts
 0.0 pts

 Apr
 May
 Jun
 Jul
 Aug
 Sep
 Oct
 Nov
 Dec
 Jan
 Feb
 Mar
 Apr

 2020
 2021
 2021
 2021
 2021
 2021
 2021
 2021
 2021

Client Cash Balances (\$ billions)



Total Net New Assets (\$ billions)



Net Buy (Sell) Activity (\$ billions)

