

Custom Clearing Services

Training and Support

LPL Financial Custom Clearing Services provides full training and support for your headquarters staff, branch managers and regional employees at all stages of the conversion process and beyond. You'll have the support you need before, during and after your conversion to ensure a smooth transition to our state-of-the-art platform. Our comprehensive training program includes web-based training modules, WebEx presentations, conference calls and in-person training, as well as assistance in the promotion and marketing of your training sessions.

Service you can count on

Once your conversion is complete, you'll continue to enjoy:

- Dedicated call center for clients and reps covering operations, advisory sales support, technology, service and trading
- Service centers on both coasts for longer service hours
- Outbound calls by call center to rep is optional
- Call center incident tracking system and reporting based upon the criteria you select