



November 3, 2009

Cary, NC – Financial services professionals affiliated with LPL Financial can now access compliance-approved college planning software provided by Collegiate Funding Solutions (CFS).

CFS is the leading provider of innovative web-based college planning solutions for financial institutions and professional advisors. LPL Financial is one of the nation's leading financial services companies and largest independent broker/dealer.

CFS's college planning software (think TurboTax) helps financial services professionals easily, immediately and dramatically improve their college planning and funding expertise – often saving the client significant amounts of money on out-of-pocket college costs – as well as deepen client relationships, increase revenue and provide for diversification of service offerings.

“LPL Financial is 100% committed to the success of the financial advisors we serve and so we are always exploring services and tools to help them succeed in running their own practices,” said Kevin Fox, AVP Financial Planning Group. “The compliance approval of the CFS software is the latest example of LPL Financial delivering on that commitment.”

“We are very excited about our relationship with LPL Financial and the opportunity to offer LPL Financial advisors a valuable and much-needed service to grow their business,” said Roger Lorelle, president of CFS. “By approving CFS for use by its advisors, LPL Financial has made it easy for them to diversify their business and to offer a timely and much-needed service to their clients.”

About LPL Financial

LPL Financial is one of the nation's leading financial services companies and largest independent broker/dealer (based on total revenues as reported in *Financial Planning* magazine, June 1996-2009). Headquartered in Boston, Charlotte, and San Diego, LPL Financial and its affiliates offer industry-leading technology, training, service, and unbiased research to 12,294 financial advisors, 780 financial institutions, and over 4,000 institutional clearing and technology subscribers. For additional information about LPL Financial, visit www.lpl.com.

About Collegiate Funding Solutions

Collegiate Funding Solutions (CFS) is the leading provider of innovative and integrated web-based college funding solutions and college planning software for the financial services industry and financial services professionals. For additional information on Collegiate Funding Solutions, visit www.collegiatefundingsolutions.com

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