

Benefit Transfer Process

Focus, our largest and most comprehensive annual conference, is designed to provide a robust slate of education and networking offerings while celebrating your remarkable accomplishments. Although we look forward to connecting with you each year at Focus, we recognize taking care of your clients is your number one priority. At times, this may require you to remain in the office and designate another advisor or staff member to attend on your behalf.

The following steps provide guidance on transferring your earned club-level benefits to another advisor or staff member attending in your place.

Important Deadline

The deadline to transfer benefits for Focus 2026 is **Friday, June 26, 2026**. Requests submitted after this date will not be processed—no exceptions.

Please reach out to your Success Manager, Regional Branch Manager, or Conference Experiences & Events at conferences@lplfinancial.com with any questions.

Eligibility

Institution Qualifiers – Important Notice:

All transfer requests require program leader approval before being submitted.

Summit & Masters Qualifiers

Summit and Masters qualifiers can transfer **all complimentary Focus benefits** to another advisor or staff member, including:

- Registration for the qualifier
- Roundtrip, economy-class airfare for the qualifier
- Hotel accommodation of one room for three nights

Ascent Qualifiers

Independent Ascent Qualifiers: May transfer **complimentary Focus registration only** to another advisor or staff member. Hotel and airfare benefits are not transferable.

Institution Ascent Qualifiers: May transfer **all complimentary Focus benefits**, including registration, airfare, and hotel accommodation for two nights.

How to Transfer Your Benefits

Submit a Benefit Transfer Request

1. All benefit transfer requests must be submitted through the **Focus Benefit Transfer Request Form** via the following link. Copy and paste the URL into your browser if you experience trouble accessing the link: https://on.lenos.com/lpl/ExceptionSite/Advisor_Individual_Request/Individual
2. Complete all required fields.
3. Click 'Next.'
4. Review your responses prior to submitting.
5. After submitting, you will receive an automated email confirming your submission details.
6. Once Focus registration opens, your request will be processed within **three business days**. You will receive an automated approval or denial notification from noreply@lplevents.com.

Post-Approval

Here's what to expect after your transfer is approved:

- **If the benefits recipient received an invitation and has not registered:**
Upon approval, your transferred benefits will be applied to the recipient's login ID. The recipient can proceed through registration with your benefits loaded.
- **If the benefits recipient already registered:**
No action is required. Your benefits will be applied to their registration, and any applicable fees will be refunded. If the transfer includes airfare and the recipient has already been ticketed by LPL Financial Travel Headquarters (Maritz), a reimbursement check will be issued to the recipient approximately 10 business days following approval.
- **If the benefits recipient didn't receive a Focus invitation:**
They will receive an invitation with a unique login ID that includes your benefits applied.

Denial Circumstances

Your request may be denied in the following situations, including but not limited to:

- **You are still registered for Focus yourself.**
You must formally cancel your registration by emailing lpfinancialfocus@travelhq.com. Once cancelled, you may resubmit your transfer request.
- **Your airfare has already been ticketed.**
If airfare has been issued in your name, the benefit is considered used; LPL Financial does not allow partial benefit transfers. Per airline policy, the airfare will remain in your name for up to one year for personal use. You'll receive post-conference instructions from LPL Financial Travel Headquarters on how to use your travel credit.
- **You don't have benefits to transfer.**
You did not qualify for a club level in 2026; therefore, you do not have benefits to transfer. If you have questions concerning the LPL Financial Club Program or your qualification status, please reach out to your Success Manager, Regional Branch Manager, or lpclubprogram@lpfinancial.com.