



Optima Group, Inc.
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LPL Financial to Acquire Fortigent, LLC.

We are pleased to announce that Optima Group, Inc. has served as a consultant to LPL Investment Holdings Inc., the parent company of LPL Financial LLC, regarding its acquisition, made public today, of Fortigent, LLC.

LPL Financial, a wholly owned subsidiary of LPL Investment Holdings Inc. (NASDAQ: LPLA), is the nation's largest independent broker-dealer (based on total revenue), a top RIA custodian, and a leading independent consultant to retirement plans. With headquarters in Boston, Charlotte, and San Diego, LPL Financial offers proprietary technology, comprehensive clearing and compliance services, practice management programs and training, and independent research to approximately 12,800 financial advisors, including high-net-worth RIAs, and approximately 730 financial institutions.

Fortigent, LLC is a leading provider of high-net-worth solutions and consulting services to RIAs, banks, and trust companies. Upon completion of this transaction, Fortigent will remain solely focused on supporting sophisticated practices and those serving high-net-worth clients. Fortigent will retain its brand, its existing management team and its Rockville, MD headquarters.

We offer our congratulations to our client, LPL Financial, as well as our colleagues and friends at Fortigent on this strategic transaction.