

Advisor Benefit Transfer Process

Focus, our largest and most comprehensive annual conference, is designed to provide a robust slate of education and networking offerings and celebrate your remarkable accomplishments. While we look forward to connecting with you each year at Focus, we realize taking care of your clients is your number one priority. At times, that means you need to stay in the office and send another advisor or staff member in your place.

The steps below will guide you on how to transfer your benefits to another advisor or staff member attending in your place.

The deadline to transfer your benefits for Focus 2025 is **Friday, June 20**. Transfer requests entered after this deadline will not be processed (no exceptions). Please note, LPL Financial is closed on Thursday, June 19 in observance of the Juneteenth holiday.

Please reach out to your Success Manager, Regional Branch Manager, or Conference Experiences at Conferences@LPLFinancial.com with any questions.

Who Can Transfer Benefits?

Summit & Masters Qualifiers

Summit and Masters qualifiers can transfer all Focus benefits to another advisor or staff member.

Independent Ascent Qualifiers Only

Ascent qualifiers can only transfer their complimentary registration fee to Focus to another advisor or staff member. Hotel and travel benefits are not transferrable.

Institution Ascent qualifiers are able to transfer all Focus conference benefits (registration fee, airfare, hotel accommodations).

How to Transfer Your Benefits

Submit a Benefit Transfer Request

1. Visit the LPL Financial Exception Site by clicking [here](#).
 - a. All requests to transfer benefits must be submitted through this site.
 - b. Having trouble accessing the link? Copy and paste this URL into your browser:
<https://content.travelhq.com/events/lplexception/#/advisorrequest>
2. Enter your Master Rep ID.
3. Complete all required fields.
4. Click submit.
5. After submitting, you will receive an automated email confirming your submission details.

Once Focus registration opens, your request will be processed within 3 business days. You will receive an automated confirmation email after your request is processed stating whether the request has been approved or denied. The automated email will come from exception.request@maritz.com.

What happens once a request is approved?

- **If the advisor/staff member received their own invitation to Focus and have not yet registered**, no action is required; your benefits will be applied to their login ID. When they proceed through the registration process, your benefits will be applied automatically.
- **If the advisor/staff member received their own invitation to Focus and have already registered**, no action is required; your benefits will be applied to their registration and any applicable fees will be refunded.
- **If the advisor/staff member did not receive their own invitation to Focus**, an invitation with a unique login ID will be sent to them and your benefits will be applied to their registration.

Why would a request be denied?

- **If you submit a benefit transfer request and are still registered for Focus yourself**, your request to transfer will be denied. You must formally cancel your registration by emailing LPLFinancialFocus@TravelHQ.com. After cancelling your registration, please resubmit your benefit transfer request for approval.
- **If you are registered and have been ticketed airfare but are cancelling your registration and transferring your benefits**, your request to transfer will be denied. Though you are cancelling, the airfare issued to you will remain in your name for up to one year for personal use due to airline policies. LPL Financial does not allow partial benefit transfers. If one benefit is already being utilized, the request must be denied. You will receive an email post-conference from LPL Financial Travel Headquarters with instructions on how to use your travel credit.

Reimbursements

If I have already been ticketed airfare, when will I receive my reimbursement?

- If you received a benefit transfer or special exception that includes airfare and you have already been ticketed, you will receive a reimbursement check from Maritz Global Events approximately 10 business days after your benefit transfer or special exception has been approved.