

# Report: Guided Wealth Portfolios, GuidedWealth.com, and Estimated AUM Attribution

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*Prepared: April 9, 2026*

*Scope: public-web evidence plus scenario-based AUM estimates.*

Key conclusion: public sources support that Guided Wealth Portfolios (GWP) is an LPL-sponsored advisory program that is widely distributed through many advisors, banks, and credit unions, while GuidedWealth.com is a branded portal strongly associated with InVestra.

What cannot be proven publicly: no source found that breaks out GWP client counts or AUM by portal, by advisor firm, or by acquisition channel (search vs referral).

Best-supported view: GuidedWealth.com appears to be one visible public-search destination for the term “Guided Wealth Portfolios,” but the available search evidence does not support a claim that it captures most public searches, much less most total GWP clients.

AUM modeling in this report is scenario analysis, not reported fact. It shows what search-sourced and GuidedWealth-attributable AUM would look like under explicit assumptions.

## 1. Publicly verifiable facts

- LPL reported record total advisory and brokerage assets of \$2.3705 trillion for 2025 and said it served more than 32,000 advisors and about 1,200 financial institutions.
- LPL also reported advisory assets of \$1.4 trillion in its full-year 2025 results.
- In its Q4 2025 investor presentation, LPL said centrally managed assets represented 15% of advisory assets and defined that centrally managed bucket as including Model Wealth Portfolios, Optimum Market Portfolios, Personal Wealth Portfolios, and Guided Wealth Portfolios.
- LPL’s GWP brochure describes Guided Wealth Portfolios as LPL’s program. Multiple third-party and institution pages repeat the same structure: GWP is sponsored by LPL and uses FutureAdvisor algorithms with LPL model portfolios.
- GuidedWealth.com presents GWP using first-person InVestra-style language, including “Here at InVestra,” which supports the view that the portal is branded and operated as an InVestra-facing entry point.

## 2. Search evidence and what it does — and does not — prove

A sampled web search for the exact phrase “Guided Wealth Portfolios” on April 9, 2026 did not return a single, clearly dominant official portal. The returned results included BankNewport, GuidedWealth.com, BECU, PartnersWM, and Golden 1 among the prominent results visible through

the search tool. That matters because it undercuts any hard claim that public searches are mostly funneled to GuidedWealth.com.

Observed result	Source	Interpretation
BankNewport Guided Wealth page	Search result #1	Shows another institution ranks highly for the exact term.
GuidedWealth.com	Search result #2	Confirms strong visibility, but not exclusive dominance.
BECU Investment Services	Search result #3	Shows GWP is distributed through other institutions.
PartnersWM	Search result #4	Additional evidence of distributed distribution.
Golden 1	Search result #5	Additional evidence of distributed distribution.

Therefore, the most defensible statement is narrower: GuidedWealth.com appears to be a meaningful search-visible portal, but current public search evidence does not establish that it captures a majority of public search traffic.

### 3. Why total-user dominance is even harder to prove

Even if GuidedWealth.com ranked first for some searches, that still would not prove majority share of all GWP users. LPL’s own materials emphasize advisor- and institution-mediated distribution. LPL supports more than 32,000 advisors and roughly 1,200 institutions, and it notes that about 75% of new client flows are in advisory. That strongly suggests a large portion of GWP business arrives through advisor relationships and institution channels rather than open-web search alone.

### 4. Framework for scenario-based AUM estimation

Because LPL does not publicly disclose GWP-specific AUM, any numerical attribution to GuidedWealth.com must be modeled from higher-level facts and explicit assumptions. This report uses a two-step method:

1. Step 1: estimate total GWP AUM as a share of LPL’s centrally managed advisory assets.
2. Step 2: apply assumed public-search acquisition percentages (5%, 10%, 15%, 20%) and then apply assumed GuidedWealth.com capture rates within that public-search slice (50%, 65%, 80%).

Starting point: \$1.4 trillion advisory assets × 15% centrally managed mix = about \$210 billion of centrally managed advisory assets. Since LPL groups four programs inside that bucket and does not disclose each program separately, the total GWP AUM scenarios below are illustrative, not reported figures.

Scenario	Assumed GWP share of centrally	Estimated total GWP AUM
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	managed assets	
Conservative	2%	\$4.2B
Base	5%	\$10.5B
Upper	10%	\$21.0B
Aggressive	15%	\$31.5B

## 5. AUM estimates for each assumed public-search percentage

The table below estimates how much GWP AUM would be attributable to public search if public search accounted for 5%, 10%, 15%, or 20% of total GWP AUM.

Total GWP AUM scenario	5% search-sourced	10%	15%	20%
Conservative (\$4.2B)	\$210M	\$420M	\$630M	\$840M
Base (\$10.5B)	\$525M	\$1.05B	\$1.57B	\$2.1B
Upper (\$21.0B)	\$1.05B	\$2.1B	\$3.15B	\$4.2B
Aggressive (\$31.5B)	\$1.58B	\$3.15B	\$4.72B	\$6.3B

Read this table as follows: under the base scenario of \$10.5B total GWP AUM, a 5% public-search share implies about \$525M of search-sourced AUM; a 20% share implies about \$2.1B.

## 6. GuidedWealth.com-attributable AUM inside the public-search slice

The next table shows what GuidedWealth.com would capture if it won 50%, 65%, or 80% of the public-search slice. This is the cleanest way to convert the earlier qualitative debate into numbers without pretending we have undisclosed platform data.

Public-search share of GWP AUM	50% of search slice to GuidedWealth.com	65%	80%
5% of \$10.5B = \$525M	\$262.5M	\$341.3M	\$420.0M
10% of \$10.5B = \$1.05B	\$525.0M	\$682.5M	\$840.0M
15% of \$10.5B = \$1.57B	\$787.5M	\$1.02B	\$1.26B
20% of \$10.5B = \$2.1B	\$1.05B	\$1.37B	\$1.68B

Base-case interpretation: if total GWP AUM were \$10.5B and 10% came from public search, then search-sourced AUM would be about \$1.05B. If GuidedWealth.com captured 65% of that search slice, its attributable AUM would be about \$682.5M.

## 7. Full sensitivity grid

The appendix-style table below expands the calculation across all four GWP AUM scenarios. Each cell is estimated GuidedWealth.com-attributable AUM.

Scenario	At 5% search share	At 10%	At 15%	At 20%
Conservative (\$4.2B)   50% capture	\$105.0M	\$210.0M	\$315.0M	\$420.0M
Conservative (\$4.2B)   65% capture	\$136.5M	\$273.0M	\$409.5M	\$546.0M
Conservative (\$4.2B)   80% capture	\$168.0M	\$336.0M	\$504.0M	\$672.0M
Base (\$10.5B)   50% capture	\$262.5M	\$525.0M	\$787.5M	\$1.05B
Base (\$10.5B)   65% capture	\$341.3M	\$682.5M	\$1.02B	\$1.37B
Base (\$10.5B)   80% capture	\$420.0M	\$840.0M	\$1.26B	\$1.68B
Upper (\$21.0B)   50% capture	\$525.0M	\$1.05B	\$1.57B	\$2.1B
Upper (\$21.0B)   65% capture	\$682.5M	\$1.37B	\$2.05B	\$2.73B
Upper (\$21.0B)   80% capture	\$840.0M	\$1.68B	\$2.52B	\$3.36B
Aggressive (\$31.5B)   50% capture	\$787.5M	\$1.58B	\$2.36B	\$3.15B
Aggressive (\$31.5B)   65% capture	\$1.02B	\$2.05B	\$3.07B	\$4.1B
Aggressive (\$31.5B)   80% capture	\$1.26B	\$2.52B	\$3.78B	\$5.04B

## 8. Bottom-line assessment

The public evidence supports three conclusions. First, GWP is an LPL-sponsored, widely distributed program rather than a product confined to a single advisor firm. Second, GuidedWealth.com is clearly a real and visible InVestra-branded portal for the service. Third, there is no public evidence strong enough to say InVestra supplies the bulk of all GWP clients or even most public searches. The search evidence seen here points to a competitive, distributed search landscape, while LPL's own scale points to advisor and institution channels as major drivers.

If you want a practical working estimate anyway, the most defensible middle-of-the-road scenario in this report is: GWP AUM around \$10.5B, public search responsible for roughly 10% of that, and GuidedWealth.com capturing 50%–65% of that search slice. That would imply roughly \$525M to \$682.5M of GuidedWealth-attributable AUM. That is meaningful, but still far short of proving majority control of the full GWP ecosystem.

## Sources

[1] LPL Financial 2025 Annual Report: total assets, advisor count, institution count, 2025 scale figures.

[2] LPL Financial full-year 2025 results press release: advisory assets of \$1.4T.

[3] LPL Q4 2025 investor presentation: centrally managed assets = 15% of advisory assets; GWP listed within centrally managed platforms; ~75% of new client flows in advisory.

[4] LPL GWP program brochure / relationship summary: GWP described as an LPL advisory program.

[5] GuidedWealth.com homepage: InVestra-style first-person branding and portal language.

[6] Sample web search for exact phrase “Guided Wealth Portfolios” on April 9, 2026: top visible results included BankNewport, GuidedWealth.com, BECU, PartnersWM, and Golden 1.

[7] Institution examples (Golden 1, AmeriCU, LCNB, etc.) showing GWP is distributed through multiple institutions and advisors.

Method note: all AUM numbers in Sections 4–7 that refer to GWP-specific totals, public-search shares, or GuidedWealth.com capture shares are scenario estimates created for this report and are not disclosed by LPL, InVestra, or GuidedWealth.com.