



Press Release

FusionIQ Recognized as Finalist in Two Categories of the Wealth Management 2023 'Wealthies' Industry Awards

WOBURN, Mass., June XX, 2023 – FusionIQ, a leader in the delivery of cloud-based wealth management solutions with their all-in-one digital platform for financial advisors and institutions today announced it was the only firm to be selected as a finalist in two categories in the TAMP (Turnkey Asset Management Program) category, receiving recognition for both their innovative digital TAMP and their Digital Model Marketplace.

FusionIQ's finTAMP delivers the first true digital TAMP, integrating their all-in-one, multi-custodian advisor platform with end-to-end digital investment management technology. A fully digital TAMP provides RIAs and independent broker dealers with an easy on-ramp to greater efficiency, productivity, and lower costs than traditional TAMPs, with white label platforms implemented in as little as six weeks. finTAMP delivers the modern experience clients and advisors want with a broad range of essential advisor tools and the flexibility firms need to profitably scale and grow.

The Digital Model Marketplace makes it easy for advisors and clients to create personalized portfolio solutions at scale. Advisors can choose models created by leading strategists, build their own, or use a combination of both. The Digital Model Marketplace puts advisors in control of winning investment strategies at a lower cost. It also provides advisors and firms with a digital channel to distribute their own custom models.

"We're honored to receive this prestigious recognition from WealthManagement.com," said FusionIQ Chief Executive Officer Mark Healy. "At FusionIQ, we're creating a new map that makes digital transformation easy for financial advisors and institutions. Being a Wealthies finalist validates our easy to implement approach to digital and speaks to the value we're bringing our clients. We also extend our congratulations to the other finalists and look forward to celebrating with them at the awards ceremony in September."

Now in its ninth year, the WealthManagement.com Industry Awards is the only awards program of its kind to honor outstanding achievements by companies, organizations and individuals that support financial advisor success. A panel of judges made up of top names in the industry, led by WealthManagement.com director of editorial strategy and operations David Armstrong, chose the finalists and will determine the winners, which



each year recognizes the firms and individuals who are bringing new innovations to market that make a real difference to the daily activities of financial advisors.

Winners will be announced at a gala and awards ceremony in New York City Sept. 7.

“The Industry Awards are a beacon, illuminating the trailblazers and innovators who are shaping the future of the financial services industry,” said David Armstrong, director of editorial strategy and operations. “They serve as a leading indicator of future activity, and as a barometer for the dynamic ecosystem of companies and organizations that empower, support and enable advisor success who are driving the industry forward.”

About WealthManagement.com

WealthManagement.com, an Informa business, provides everything wealth professionals need to know to stay knowledgeable about the industry, build stronger relationships, improve their practice, and grow their business. WealthManagement.com offers financial services organizations a broad array of marketing services designed to help them influence the industry’s leading audience of wealth management professionals.

About FusionIQ

FusionIQ makes it easy for financial advisors and institutions to be digital wealth leaders. The intuitive, all-in-one FusionIQ One platform has four easy to implement modules - Digital Advice, Self-Directed, Digital Model Marketplace, and finTAMP – making digital transformation hassle free. FusionIQ One’s simple, pay as you grow approach, makes it easy for credit unions, banks, RIAs, independent broker dealers and asset managers to scale, delivering the digital experience clients and advisors want and the workflows and process automations they need to grow. With white label integrations complete in as little as six weeks, it’s easy to see why FusionIQ’s integrated multi-custodian platform is quickly becoming the digital solution of choice for advisors and institutions. To learn more, please visit: <https://fusioniq.io>.