



NEWS FROM THE MOTIVE PARTNERS NETWORK

FNZ announces strategic partnership with Microsoft to accelerate the transformation of the wealth management industry

FNZ and Microsoft have entered a global, five-year strategic partnership to accelerate digital transformation across the wealth management industry.

The partnership strengthens FNZ's global platform by enhancing its AI, automation and cloud capabilities.

The goal is to drive value for financial institutions and their clients by enhancing operational efficiency, accelerating innovation and increasing speed to market.

The collaboration includes co-innovation, joint go-to-market initiatives and the development of new AI-powered digital wealth solutions.

London, July 28, 2025 – FNZ, a leading end-to-end wealth management platform has today announced a global, five-year strategic partnership with Microsoft to transform the wealth management industry through technology, innovation and AI-driven digital solutions.

The partnership combines FNZ's industry-leading technology, wealth management expertise and global reach with Microsoft's advanced AI capabilities, cloud infrastructure and engineering excellence.

By integrating Microsoft Azure AI Foundry at the heart of its platform, FNZ is redefining how financial institutions, advisors and their clients interact by delivering more personalized, intelligent and resilient digital wealth management experiences. This collaboration with Microsoft accelerates this transformation by helping FNZ bring new solutions to market faster, enhance client outcomes, boost advisor productivity and drive innovation across industry.



With more than 650 financial institution partners, over 26 million end investors and close to \$2 trillion in assets under administration, FNZ brings scale to the partnership. This provides access to one of the largest wealth management data sets in the world, enabling the powerful application of AI, cloud technologies and analytics to deliver deeper insights, greater personalization and better outcomes for advisors, clients and institutions alike.

Partnership highlights

Through the partnership, FNZ will work with Microsoft to deliver advanced AI tools, drive new technology development and collaborate on joint go-to-market initiatives, including:

- **Creating a next-generation advisor and investor experience:** FNZ will integrate Azure AI Foundry capabilities, including Azure OpenAI in Foundry Models, into its market-leading platform to provide enhanced personalization, greater efficiency and a next-generation user experience.
- **Innovative applications for data and analytics:** FNZ will utilize Microsoft Fabric to strengthen its data and analytics capabilities, delivering deeper insights tailored to the unique needs of wealth managers and advisors.
- **Co-development and joint engineering:** FNZ will develop new digital wealth solutions by embedding Azure AI Foundry into FNZ's global platform. Joint engineering teams will accelerate product innovation, enhance platform intelligence, and deliver secure, scalable services that strengthen risk management, compliance and resilience. FNZ will also deploy GitHub Copilot across its engineering teams to boost developer productivity and innovation.
- **Resilience and scalability:** By combining FNZ's market-leading platform and delivery capabilities with Microsoft's technologies and tooling, the partnership will help create more resilient, scalable and industrial-strength solutions for financial institutions.
- **Enhancing operational efficiency:** FNZ will also deploy Microsoft 365 Copilot and intelligent agents to support middle- and back-office processes.
- **Global joint go-to-market:** FNZ will collaborate with Microsoft on joint go-to-market activities, including the development and deployment of modular wealth solutions through multiple channels, including the Microsoft Marketplace, alongside coordinated global marketing initiatives and joint participation in industry events.

Roman Regelman, Group President, FNZ, said: "FNZ has always been at the forefront of innovation in wealth-management technology. Partnering with Microsoft allows us to accelerate our AI-led roadmap and enhances our ability to deliver personalized, intelligent and resilient solutions to our clients, strengthening our position of leadership."

"Together, we are not just upgrading technology. We are setting a new standard for how wealth management is delivered. Partnering with Microsoft further advances our mission to open up wealth, by making investing more accessible to more people worldwide."



Bill Borden, Corporate Vice President, Worldwide Financial Services, Microsoft, said: “Our partnership brings together Microsoft’s AI and cloud technologies with FNZ’s global platform and expertise in wealth management to deliver insights that will lead to more impactful and personalized experiences for advisors and their clients. Together, we’re helping financial institutions lead as Frontier Firms by reimagining their operations through agentic AI, accelerating innovation, and unlocking new value across the wealth management ecosystem.”

FNZ is backed by some of the world’s largest institutional shareholders, including Caisse de dépôt et placement du Québec (La Caisse), Canada Pension Plan Investment Board (CPP Investments), Generation Investment Management and Motive Partners.