



NEWS FROM THE MOTIVE PARTNERS NETWORK

# **FNZ REACHES RECORD MILESTONE OF US\$2 TRILLION IN ASSETS ON PLATFORM**

- Assets on Platform have grown by 406% over the last five years.
- This milestone reinforces FNZ's position as one of the world's largest wealth management platforms.
- FNZ now partners with over 650 financial institutions, more than 12,000 wealth management firms and serves over 26 million end investors globally.
- 6 out of the top 10 most recommended UK adviser platforms use FNZ technology, according to recent analysis conducted by Defaqto.
- Builds on FNZ's purpose to open up wealth by making wealth management more accessible and personalized to more people.

**New York, NY, August 21, 2025** – FNZ, the global wealth management platform, has today announced that it has reached a record milestone of US\$2 trillion in Assets on Platform. This achievement reinforces FNZ's leadership position in the global wealth industry and highlights its growing role in transforming the way wealth management services are delivered. It also reflects the accelerating global demand for FNZ's market-leading, AI-powered, end-to-end technology. Leveraging this has enabled its partners to deliver faster innovation, deeper personalization and significantly lower costs. Recent growth in Assets on Platform has been underpinned by new client wins, expansion of mandates with existing customers and organic market growth across several major geographies. Over the last five years, Assets on Platform have grown by 406% (38.3% annualised), reflecting the sustained momentum in FNZ's business globally. Founded in 2003, FNZ partners with many of the world's leading banks, insurers and wealth managers to deliver integrated technology, operations and market solutions. Today, FNZ operates in most of the world's major markets, serving over 26 million customers, and continues to expand its platform to meet the evolving needs of the industry.



In the UK, FNZ customers also feature strongly in Defaqto's latest list of the top 10 most recommended adviser platforms, with six of them using FNZ technology, as voted for by UK advisers.

**Blythe Masters, Group CEO of FNZ, said:** "Surpassing US\$2 trillion in Assets on Platform is a powerful demonstration of the strength of our platform, the dedication of our people and the deep, long-term partnerships we have with our clients."

"We only succeed when our clients succeed, and we remain relentlessly focused on supporting their ambitions, as we use technology to empower advisors and make saving for the future easier for everyone."

"We are incredibly excited about the future, harnessing our scale, technology and expertise to open up wealth and support our clients in delivering innovative, efficient and personalized wealth management and market services to millions of end investors."

FNZ works with over 650 financial institutions and more than 12,000 wealth management firms worldwide, including Aberdeen, AJ Bell, Allianz, Aviva, Bank of Montreal, Barclays, BNZ, Colonial First State, Consilium, Lloyds Banking Group, NAB, Nucleus Financial Platforms Group, Quilter, Raymond James, UOB Asset Management and Vanguard.

FNZ is backed by some of the world's largest institutional shareholders, including La Caisse (formerly CDPQ), Canada Pension Plan Investment Board (CPP Investments), Generation Investment Management and Motive Partners