



FOR IMMEDIATE RELEASE:

Trizic Rebrands as Harvest Savings & Wealth Technologies, Adds \$23 Million in Equity and Debt Financing, and Launches Two New Products.

- **New investors contribute further capital into a rapidly growing company**
- **Harvest simultaneously announces two new products that integrate savings and wealth solutions for banks and credit unions**
- **New branding reinforces company's vision to provide a holistic set of technologies to help banks, credit unions, and their customers achieve their financial goals**

SAN FRANCISCO, CA; September 3, 2019 — Harvest Savings & Wealth Technologies, the leading provider of integrated savings and wealth solutions for the financial industry, formerly called Trizic Inc., today announced a complete rebranding along with an additional \$23 million in equity and debt financing. The new funding will continue to fuel the company's impressive growth, and included the company's existing investors as well as several new investors. Harvest's new branding reinforces the company's continued expansion into providing tightly integrated savings and wealth solutions for banks and credit unions.

Harvest also announced today the arrival of two new products: Goalkeeper and Signals. Harvest's Goalkeeper is a white-labeled, automated micro-savings solution that allows financial institutions to deliver unlimited goals-based savings accounts to their customers for no monthly fees. Bank customers can set up as many goal accounts as they want, and then select an automated funding method to create a simple, frictionless way to save money and reach their financial goals.

Harvest's other new product, Signals, provides an actionable business intelligence layer that runs across a financial institution's retail and wealth core systems. Specified patterns are tracked daily, triggering resulting actions that provide tightly integrated savings and wealth solutions up and down the value chain.

"With Goalkeeper and Signals, we are rounding out a bank-wide offering and solving some of the key problems facing banks and robo advice," noted Harvest CEO Drew Sievers. "Working together, the products let banks stem the outflow of deposits going to micro-saving, micro-investing, and traditional investment companies. As bank

customers move through their savings goals, Signals also assists them in moving further upstream into the wealth and trust divisions of the bank.”

The new products will join Harvest’s existing wealth and trust solutions for Digital Account Opening and Automated Digital Advice, which are being used by firms like John Hancock, BOK Financial, First Citizen’s Bank, Apex Clearing Corporation, Central Trust Company, and several other banks which are in various stages of delivery. With an additional 5 new bank clients and more than 150 financial institutions in its active pipeline, Harvest is on pace to surpass 20 active bank clients by year-end.

“Harvest has taken a completely different approach helping banks deliver compelling digital wealth solutions,” said Doug Fritz, CEO of wealthtech consulting firm F2 Strategy. “Instead of just trying to insert a robo advisor into a bank, the Harvest team understood that the real gap within most bank wealth groups was finding a way to profitably integrate retail, wealth, and trust divisions into a unified, relationship-centered client experience. The results are going to be faster growth, retained deposits, and much more value delivered than traditional digital client experience initiatives for banks.”

Goalkeeper and Signals are now available and will debut with Radius Bank in Fall 2019.

ABOUT HARVEST SAVINGS & WEALTH TECHNOLOGIES – Harvest Savings & Wealth Technologies provides integrated, enterprise-grade digital savings and wealth solutions to banks, credit unions, trust companies, and other financial institutions. The firm’s technology was architected and engineered to deliver cutting edge, end-to-end digital solutions that unify and automate a bank’s savings, wealth and trust divisions. Harvest supports multiple custodial and trust systems. Harvest is a technology company and has no direct-to-consumer digital advisory offering. For more information, visit www.harvestsw.com.

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