



FOR IMMEDIATE RELEASE:

Trizic Raises \$10-Million Series A

SAN FRANCISCO, CA March 1, 2018 -- Trizic, a leading provider of digital workflow and automation technology for the wealth industry, today announced a \$10 million Series A investment led by venture capital firm Sorenson Ventures with participation from FIS (NYSE: FIS), a global leader in financial services technology, and Betsy Cohen, the founder and former CEO at The Bancorp Bank. Existing investors Freestyle Capital, Broadhaven Capital Partners, PEAK6, and Commerce Ventures also participated in the round.

The capital infusion comes at a time when Trizic is rapidly expanding its offering across the wealth spectrum, deploying digital wealth technology to RIAs, Asset Managers, Broker Dealers, Banks, and Credit Unions.

“Banks and credit unions are incredibly well positioned to leverage digital wealth technology,” noted founder and former CEO of the Bancorp Bank, Betsy Cohen. “Trizic’s technical foundation and executive experience are ideally suited to rapidly deliver digital wealth to the banking industry.”

“For the past year, we’ve focused on successfully deploying solutions for our clients, and advancing the underlying technology and connections into, and out of, the Trizic platform,” commented Drew Sievers, Trizic CEO. “With a strong sales pipeline and many conversions across all three of our target verticals, now was the perfect time to bring in some

incremental capital, and expand our deployment and sales organizations.”

“Drew is a successful serial entrepreneur that we have backed previously. Drew and the team at Trizic are a battle-tested and proven group of entrepreneurs with the ideal mix of technical acumen, bank knowledge, and wealth expertise,” said Rob Rueckert, Managing Director at Sorenson Ventures. “They’ve had the proper focus from the start, providing enterprise scale clients with a single, powerful platform. It’s a pleasure to partner with Drew again.”

Unlike other firms in the industry attempting to pivot their B2C robo advisor technology, or simply rolling up various disparate B2B assets, Trizic’s platform is a single, elegant, enterprise-class solution that was designed from the start as a scalable, comprehensive platform for advisors and investors.

ABOUT TRIZIC – Trizic provides enterprise-class, digital investment technology to wire houses, brokerages, asset managers, banks, credit unions, and Registered Investment Advisors. Trizic’s hosted platform was built from the start with the enterprise in mind. Trizic technology was architected and engineered to deliver cutting edge, end-to-end digital wealth solutions to the industry’s largest, most demanding players. The Trizic Platform is investment-product agnostic and accommodates ETFs, mutual funds, and equities. Trizic is a technology company and has no direct-to-consumer digital advisory offering. For more information, visit www.trizic.com.

ABOUT SORENSON VENTURES – Sorenson Ventures (www.sorensoncapital.com) is an early-stage venture capital firm focused on accelerating cutting-edge innovations in the software and security sectors. Sorenson Ventures typically leads or co-leads and

invests up to \$15M over the life of the investment. Sorenson Ventures is based in Palo Alto, CA and Salt Lake City, UT.

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