



FOR IMMEDIATE RELEASE:

Trizic Appoints Steve Lewczyk As Chief Revenue Officer

Proven industry innovator and leader joins firm.

SAN FRANCISCO, CA -- May 31, 2017 -- Trizic, the leader in enterprise class digital advice and workflow technology, today announced that Steve Lewczyk, a proven wealth industry veteran, has joined the firm as Chief Revenue Officer.

Lewczyk has more than 25 years is sales, business development, and corporate development at industry-leading firms like Fidelity, Advent Software, and Nirvana Solutions. During his career, Lewczyk has successfully built fintech sales organizations at both early stage companies and institutional, established firms.

“Having Steve join Trizic is a real coup for us,” commented Drew Sievers, Trizic CEO. “His understanding of the industry is incredibly deep, and his hands-on approach is already reaping rewards for Trizic in our RIA and enterprise verticals. It’s not uncommon for industry veterans to join start-ups and then fail to get their hands dirty. That’s not the case with Steve. He’s an entrepreneur first and foremost. From day one, he’s been up to his elbows in driving deal flow and building a robust pipeline.”

Lewczyk was a pioneer in the portfolio management industry, driving adoption within the RIA space at Advent, increasing the client base from 300 to 3,000 firms during his tenure. At Fidelity, Lewczyk accelerated the firm’s IAG group from inception up to \$25 Billion in assets under management. Most recently, Lewczyk was a co-Founder at hedge fund technology provider

Nirvana Solutions where he built and drove sales for the firm, growing to more than 150 licensed fund clients.

“In 5 years, digital technology will change the way advisors communicate with investors, operate their businesses and market their services,” said Lewczyk said. “Trizic’s platform is the most robust and real solution in the space. I’m excited to join the Trizic team to drive growth and help advisors realize their digital opportunity.”

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.

CONTACT:

Drew Sievers
Trizic Inc.
415-366-6583
pr@trizic.com
www.trizic.com

—End—