



FOR IMMEDIATE RELEASE:

Freestyle Capital Leads \$3.3MM Investment Into Trizic

SAN FRANCISCO, CA FEBRUARY 13, 2017 -- Trizic, the leader in enterprise class digital advice technology, today announced an oversubscribed \$3.3MM equity investment led by Freestyle Capital, with participation from Broadhaven Capital Partners and Commerce Ventures.

The new capital will accelerate Trizic's already rapid growth and reinforce its position as the preeminent provider of enterprise grade digital advice technology.

"The digital advice space is incredibly disruptive to the existing wealth management industry, so it is a sector that is particularly interesting to investors," commented Drew Sievers, Trizic CEO. "With this investment, we're well positioned to continue executing our strategy to be the premier solution for large scale digital wealth deployments."

Conceived from the start as an industry-focused offering, the Trizic platform provides a turnkey, enterprise grade digital advice solution for RIAs, broker dealers, asset managers, wirehouses, banks, and credit unions.

"We see the digital advice sector as being critical to the existing players in wealth management," said Dave Samuel, Co-Founder and Partner at Freestyle. "Trizic's laser focus on enabling, rather than disrupting, the existing wealth industry resonated with us as the right approach to this market."

“Digital advice solutions are changing the advisor-client relationship and Trizic's enterprise-grade platform and cutting edge technology stood out to us,” noted Michael Sidgmore, Venture Partner at Broadhaven Capital Partners. “Trizic's strong list of clients and strategic partnerships, in addition to Drew's proven leadership in fintech, make us excited about participating in Trizic's growth.”

"We have known Drew for nearly a decade and are excited to be working with him and the Trizic team as they help modernize the investing world,” added Dan Rosen, Founder and Partner at Commerce Ventures. “Today's wealth management technology is decades old and is sorely overdue for an upgrade to a cloud-architected, digital platform like Trizic's.”

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

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