



About FNZ

FNZ is committed to opening up wealth so that everyone, everywhere can invest in their future on their terms. We know the foundation to do that already exists in the wealth management industry, but complexity holds firms back.

We created wealth's growth platform to help. We provide a global, end-to-end wealth management platform that integrates modern technology with business and investment operations. All in a regulated financial institution.

Helping customers remove friction

We make our customers' growth frictionless, enabling the creation of personalized and scalable advisor and end-investor experiences.



Greater control to focus on your unique value proposition



Improved personalization to serve more types of customers, efficiently



Accelerated innovation to easily deploy new functionality and remain at the cutting edge



Cost savings due to linking our fee model to your AUA



Empower investors via access to an investment universe

\$1.7tn+

Assets Under Administration

650+

Customers

12,000

Wealth Management Firms

24m+

End Customers

6,000+

Employees Worldwide

30+

Global Locations

20+

International Markets



2003

FNZ founded in Wellington, New Zealand.



2006

FNZ begin global expansion with move into the United Kingdom.



2007

FNZ pass the first \$1 billion in assets under administration.



2008

FNZ management team buy out the company in partnership with private equity backers.



2009

Expand into the Australian market and open offices in Sydney and Melbourne.



2010

Open Technology Centre in Brno, Czech Republic.



2015

FNZ strengthen presence in APAC with new Singapore office.



2016

Open new Solution Centre in Shanghai, China.



2017

FNZ pass \$200 billion in assets under administration.



2018

CDPQ & Generation Investment Management make long term-investment in FNZ.



2019

Launched the world's first Blockchain ecosystem for the asset management industry.



2020

New investment from Temasek, enhancing reach into key Asian markets.

**2020**

FNZ pass \$1 trillion in assets under administration.

**2022**

FNZ raise \$1.4 billion in new capital in one of the largest ever primary capital raises. Transaction values FNZ at over \$20 billion.

**2023**

FNZ celebrates 20 years of leading the wealth management market.

**2024**

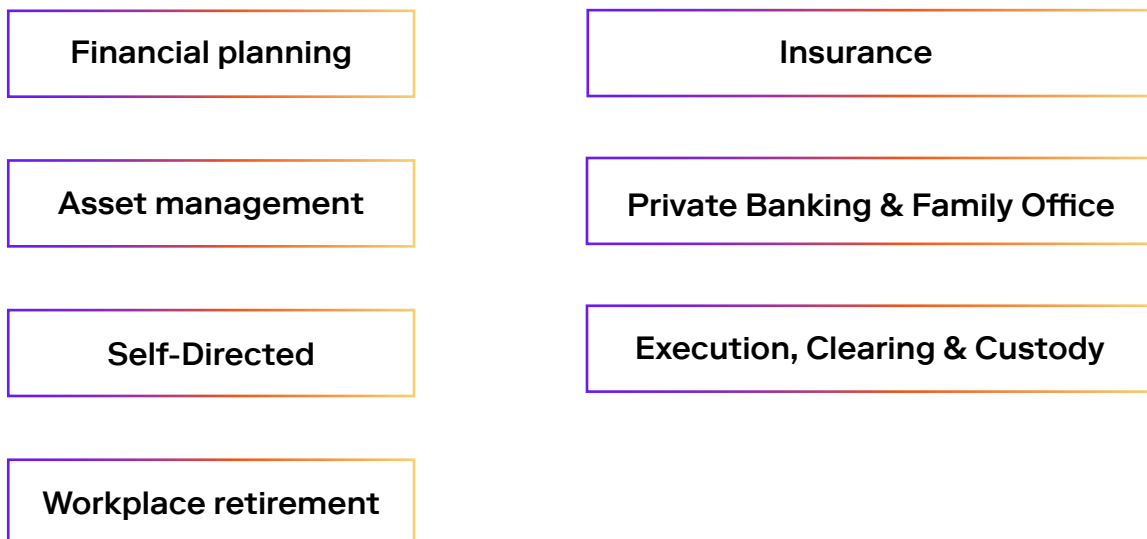
FNZ announce leadership transition, with Adrian Durham becoming Non-Executive Founding Director and Senior Advisor, Blythe Masters being appointed as Group CEO and Roman Regelman joining as Group President. Existing shareholders also commit \$1bn of capital to support the enduring success of FNZ over the long term.

Our Customers

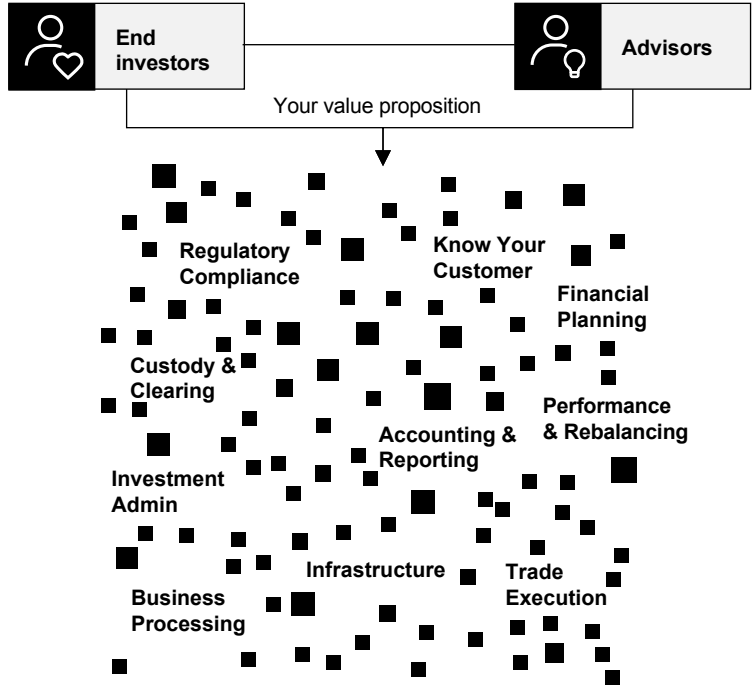
FNZ serves the entire wealth management industry, trusted by more than 650 financial institutions and 12,000 wealth managers globally.



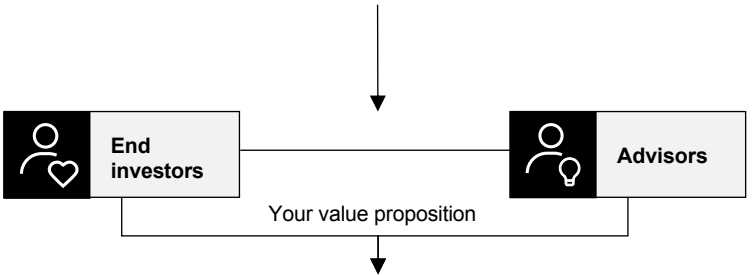
Our Solutions



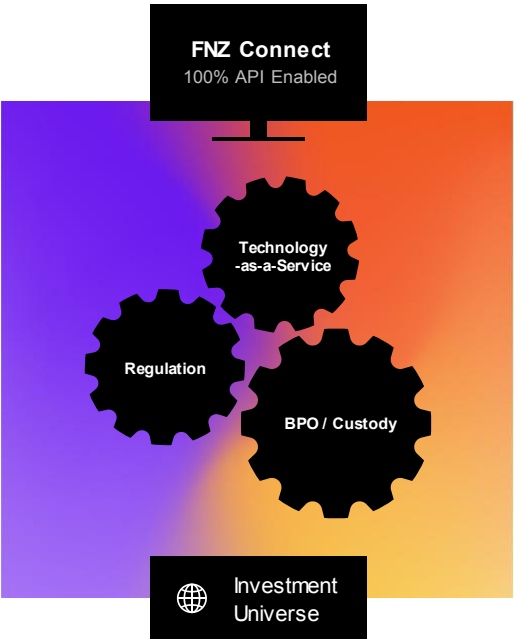
Scale and innovate with our end-to-end platform



To deliver value to advisors and end clients, financial institutions manage a lot of complexity that needs to be integrated.



Our platform integrates technology-as-a service, BPO/custody, and regulations to operationalize, personalize and accelerate differentiation.



Regulated in 9 Countries

We are
wealth's
growth
platform.