



## 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 clients remove friction

We make our clients' 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

**\$2.5tn+**

Assets On Platform

**30m+**

End Investors

**7,000+**

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 Clients

We partner with the world's leading financial institutions, with over US\$2.2 trillion in assets on platform (AoP). Together with our clients, we empower nearly 30 million people across all wealth segments to invest in their future.



## Our Solutions

Financial planning

Insurance

Asset management

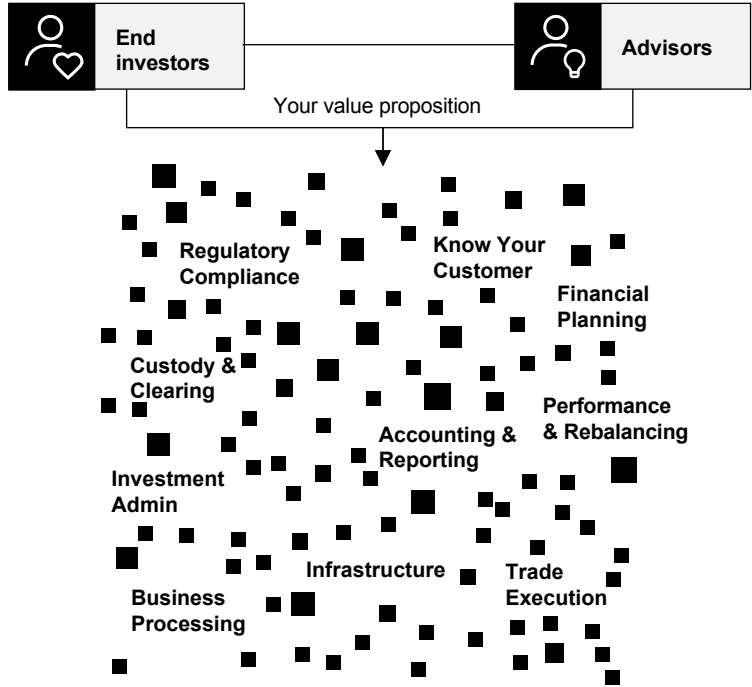
Private Banking & Family Office

Self-Directed

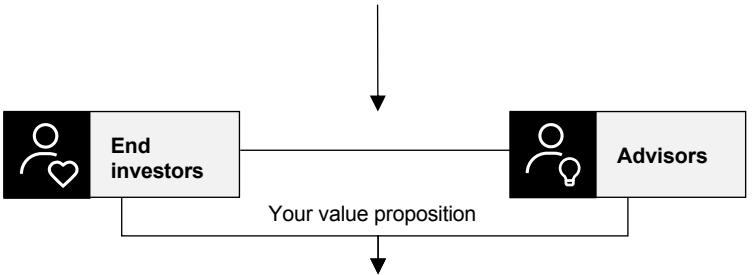
Execution, Clearing & Custody

Workplace retirement

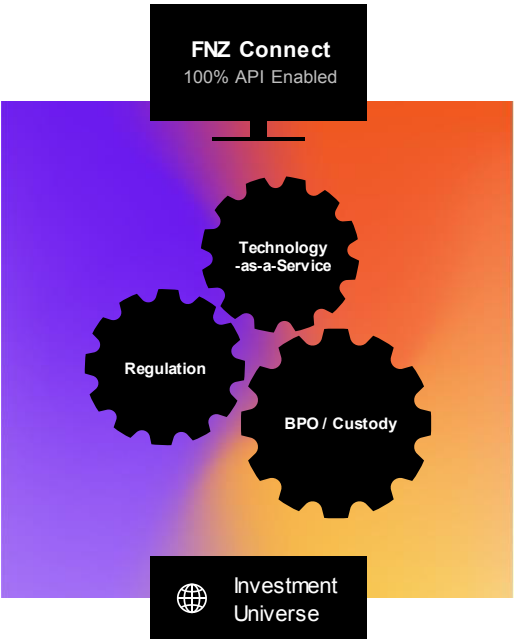
# Scale and innovate with our end-to-end platform



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.