

PRESS RELEASE

GLOBAL-FINANZ chooses Fundsaccess advisory technology for its investment business

- **Advisors at GLOBAL-FINANZ will have access to Fundsaccess' white-label solution for the entire investment advisory value chain**
- **The investment business at GLOBAL-FINANZ will be strengthened and expanded with a comprehensive advisory software, digital onboarding, and digital order processing to the custodian bank**
- **With this new client win, Fundsaccess further solidifies its leading position in the field of financial investment intermediaries**

Munich, 25.07.2023 – Fundsaccess has won another significant customer with GLOBAL-FINANZ, a leading German one-stop financial advisory firm, underscoring the strength and comprehensiveness of its WealthTech solution.

Fundsaccess was able to convince during a multi-month selection process with its innovative and comprehensive solution. Particularly, the holistic investment platform, regulatory compliant advisory process, including API integration for onboarding and ordering were decisive factors for Fundsaccess.

GLOBAL-FINANZ and Fundsaccess will immediately start the roll-out of the application, enabling the advisors at GLOBAL-FINANZ to benefit from the new investment platform within weeks.

Rolf-Henning Hackel, Chief Commercial Officer of Fundsaccess, says: "We are proud to have won one of Germany's leading financial advisory firms, GLOBAL-FINANZ, as a new customer. This partnership is a clear indication of the trust in our innovative WealthTech solutions and our ability to meet the complex requirements of independent investment advisory."

Julian Hertinger, Head of Investments at GLOBAL-FINANZ, adds: "During our search for a new software solution for investment advisory, Fundsaccess convinced us with their comprehensive solution. Especially the ESG-compliant advisory process, which focuses on the customer and not product sales, aligns with our advisory philosophy and complements us ideally - especially since the guidelines of DIN 77230 'Basic Financial Analysis for Private Households' have applied to all Global-Finanz intermediaries for three years now. We look

forward to working with Fundsaccess and are confident that this partnership will lead to further increases in our efficiency and quality."

About fundsaccess:

fundsaccess AG is one of the leading SaaS providers of digital advisory technology in the German-speaking market and the market leader in the German IFA segment. fundsaccess offers white-label technology along the entire advisory process and serves well-known insurance companies, wealth managers, financial advisory firms, and broker pools. The product range includes investment advisory and portfolio optimization systems, client and advisor portals, product databases, and a multi-custody client management system.

About GLOBAL-FINANZ

GLOBAL-FINANZ is one of the leading independent financial advisory firms. Founded in 1979, GLOBAL-FINANZ ranks among the top 10 in the industry with over 190,000 private customers as one of the most established one-stop financial advisory firms nationwide. More than 50 of their 357 advisors are Certified Financial Planners.

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