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**Wealth Access Now Reports On Over $190 Billion; Announces Record-Breaking Year of Growth and Secures Funding to Accelerate Future Plans**

*Intelligent aggregation, business intelligence solution, and innovative client engagement tools lead to increased growth and a third-consecutive industry award for personal financial management provider*

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Wealth Access, the industry’s largest independent personal financial management and account aggregation platform, announced today that 2018 was its most successful year to date, with a 90% increase in wealth under measurement year-over-year. The company was also able to secure funding to accelerate growth plans for 2019.

This record-breaking growth further demonstrates the ability of Wealth Access to attract and retain some of the highest-performing firms in the wealth management and banking industries. Wealth Access now serves three of the top ten Registered Investment Adviser firms in the United States and five of the top 100 banks among its 232 clients.

“Our enterprise growth in 2018 is a testament to the continued strength and ingenuity of advisory firms across the industry,” said David Benskin, CEO of Wealth Access. “In today’s hyper-competitive market, advisors have recognized that an interactive and integrated digital client experience is what drives growth.

“Likewise, enterprises have recognized that the cost of proprietary experiences is prohibitively high,” Benskin continued. “As such, Wealth Access provides a digital experience that allows all advisors to profitably deliver holistic financial advice, because it is the surest path toward business stability.”

As the industry’s preeminent solution for personal financial management tools, Wealth Access also experienced new highs in the number of individual investors who access its client portal and aggregation solutions through their financial institution of choice. In 2018, Wealth Access added 10,000 users.

Because of these incredible advancements across RIA firms, bank and trust departments, and end-investor clients, Wealth Access’ revenues reached a record-high with an increase of 20% over the prior year, allowing Wealth Access to continue to invest in its technology and services.

Wealth Access also continued its dominance during awards season, winning its third-consecutive WealthManagement.com award in the “Wealth Reporting/Personal Finance Manager” category. The win also marks its fourth overall WealthManagement.com award.

Wealth Access continues to invest in its aggregation and personal finance platform, launching numerous new products and enhancements in 2018, including:

* **Mobile:** Added 13 new advisor-branded applications to the Apple iOS and Google Play stores over the course of 2018.
* **Enterprise API:** Enhanced endpoints for seamless access to award-winning suite of APIs for those firms that want to create a custom experience.
* **Integrations:** Deepened integration with key partners to create a completely seamless technology workflow between an advisor’s portfolio accounting, financial planning, and personal financial management tools, plus added four all-new integrations.
* **New Direct Feeds:** Established 10 new direct data download feeds allowing for an easier and more secure way to access financial data.
* **Advisor Customization:** Developed new functionality that provides more options for customization, including the ability to create custom Balance Sheet and widget names, expanded householding capabilities, and custom Quick Links.

“We are looking forward to expanding our team and releasing even greater enhancements and deeper integrations in the year ahead as we continue to support the ability of financial professionals to offer unparalleled value to clients and grow their firms with a comprehensive, client-centered, fully-mobile digital experience,” said Benskin.

**About Wealth Access**

Wealth Access is an innovative wealth management technology firm that provides reporting solutions for the high net worth advisor and investor community. Its proprietary and diagnostic cloud-based platform aggregates information from more than 20,000 financial services institutions and various holdings to deliver an aggregated view, allowing for better decision support in investments, tax planning, insurance and other complex situations faced by high net worth individuals. Founded by a former Merrill Lynch high-net-worth advisor, Wealth Access provides a complete platform for advisors to collaborate with other professionals and position themselves central to their clients’ lives. Headquartered in Nashville, TN, Wealth Access is backed by successful investors and notable wealth management technology platforms. For more information, please log on to [http://www.WealthAccess.com](http://www.wealthaccess.com/).