



# Q&A FOR RISKALYZE CUSTOMERS

August 25, 2021

## **What is this transaction about?**

Riskalyze has historically been owned by a mix of founders, private equity, and angel investors. After this transaction, Riskalyze will be owned by a combination of the same founders, and a new investor, Hg. One of the leading software and services investors with offices in London and New York, Hg manages \$37 billion across its fund families.

## **Has Riskalyze been acquired by or merged with another company?**

No. Riskalyze is still the same company, with the same leadership team. Our outside ownership has changed from private equity and early angel investors, to a new private equity firm who is partnering with our founders to invest in and grow Riskalyze.

## **Who will be running the company after the deal closes?**

Aaron Klein helped to co-found Riskalyze in 2011, and has served as the firm's only CEO. He has reinvested a majority of his personal holdings into the recapitalized company, and will continue to lead the firm as CEO and a member of our Board of Directors.

## **How will this affect me as a customer?**

More innovation, more investment, more growth, and more capabilities that help you empower your clients to invest fearlessly. Hg's other investments are known for groundbreaking innovation and new product capabilities, and Hg is a perfect match for Riskalyze and its core values like customer delight, focus, teamwork, communication and integrity. This transaction is a big win for those financial advisors and wealth management enterprises who are leveraging Riskalyze to drive their growth and success. We're honored to continue to serve you and your firm.

## **Does this change anything about the Fearless Investing Summit?**

Hg is headquartered in London, so it's possible there will be a slight uptick in the British accent level one can detect at Fearless. All jokes aside, we can't wait to celebrate this great moment for the Fearless Investing Movement, and then pivot our focus to the future and announce some incredible innovation for the advisors and enterprises we love to serve.