



EDELMAN FINANCIAL ENGINES

We believe everyone deserves to move their financial life forward.

We're one of America's top independent wealth planning and workplace investment advisory firms, serving 1.3 million clients.

WHAT WE DO

Our unique combination of high-tech and high-touch services helps our clients make better financial decisions during life's biggest moments.

HOW WE HELP

Our firm and our financial planners are committed to always acting in the best interests of our clients.

WE HELP CLIENTS PLAN THROUGH EVERY STAGE OF LIFE

No matter where an individual is on their financial journey, our exper1 (ne)13 (y)4ual is.9y, o1(ne)13 (y)C dua95(n3 (y)4

MARRIAGE

NEW CHILD

DIVORCE

CAREGIVING

FIRST PAYCHECK

FIRST HOME

ILLNESS


JOB PROMOTION


RETIREMENT AND BEYOND

WEALTH MANAGEMENT SERVICES


We deliver straightforward wealth planning and investment advice to help individuals and families connect the dots between key parts of their financial life in order to help build, grow, protect and preserve their wealth.




 Financial Planning

 Retirement Planning

 Investment Management

 Estate Planning

 Insurance Guidance

 Tax Planning

EMPLOYER SERVICES

Through many of the nation's leading employers, we offer an integrated suite of personalized financial solutions to support employees and plan participants across their major life events and milestones – from their first paycheck all the way through retirement – which are the times they need help the most.



Retirement Readiness

Life's Financial Moments

Everyday Wealth and Wellness

Diverse Employee Needs

\$250B Assets Under Management	10.4M Plan Participants	720+ Plan Sponsors	103 FORTUNE 500 Plan Sponsor Clients

INDUSTRY LEADERSHIP

**INDEPENDENT FINANCIAL ADVISORY FIRM
2018, 2019, 2020, 2021, 2022**

Awarded each September (2018-2022) by *Barron's*, based on data within a 12-month period. Compensation paid for use and distribution of rating.

**MANAGED ACCOUNT PROVIDER FOR
DEFINED CONTRIBUTION PLANS**

Listing published 1Q 2023 and is based on Dec. 31, 2022 Defined Contribution managed account providers data gathered by Cerulli Associates.

EXECUTIVE TEAM