

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

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FIRST PAYCHECK	FIRST HOME	ILLNESS	JOB PROMOTIO	ON	RETIREMENT AND BEYOND
WEALTH MANAGEMENT SERVICES			EMPLOYER 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.			Through many of the nation's leading employers, we o er 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.		
Financial Planning		tirement anning	Retirement Readiness		Life's Financial Moments
Investment Management		tate anning	Everyday Wealth and Wellness		Diverse Employee Needs
Guidance	ta:	x anning			

\$250B Assets Under Management	10.4 M 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.

EXECUTIVE TEAM

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.

Clients, AUM, Plan Participants, Sponsor, Advisors, Planners, Analysts and Associates data as5 (134P49 0.949 rg38 00paid f)11.1 (o (ep)9336(v00paid f)202T/1plp1 (s0 (YFIRM))] JE