

# Ally Invest Offers Investors Tax-Optimized and Income-Focused Investment Options with Expanded Set of Digital Managed Portfolio Offerings

## New Managed Portfolios Are Part of a Series Planned for 2019

CHARLOTTE, N.C., May 23, 2019 /PRNewswire/ -- As consumer demand for affordable, professionally managed investments continues to grow, Ally Invest, the brokerage and wealth management arm of Ally Financial, announced it will be rolling out a series of new, professionally managed portfolio offerings throughout 2019. Available immediately are two new offerings: a tax-optimization feature that can be applied to any Ally Invest managed portfolio and a new income-based managed portfolio.

"We know our customers' investment needs are not one-size-fits-all. In addition, not all investment strategies are created equal. Income generation is a fast growing need area for our clients and investors at large," said Lule Demmissie, president of Ally Invest. "Our goal is to combine the ease-of-use, transparency, and low-cost of digitally managed portfolios with the benefits of more relevant and custom investment options that further each investor's individual goals. Continuing to expand our suite of managed portfolio offerings gives us a nearly unlimited ability to do that."

Ally Invest's Tax Advantaged Portfolios are a more tax-efficient version of the firm's core portfolios. They are constructed with a particular asset allocation, featuring municipal bonds, that is designed to be tax-efficient while still providing returns in line with the customer's goals.

The new Income Portfolio offers investment options that are focused first-and-foremost on providing near-term income while also preserving and continuing to grow customers' overall assets. This portfolio offers a greater concentration of high dividend/yield securities along with fixed income securities. The Income Portfolio is ideal for customers who are in or nearing retirement and can benefit from ongoing income distributions or for customers interested in using the yield from their portfolio to help pay current expenses.

In addition to these two variations on Ally Invest's portfolio offerings, the firm plans to introduce a set of socially responsible portfolios and tax-loss harvesting capabilities later this year.

All of Ally Invest's Managed Portfolios are specially designed for investors seeking the benefits of professional portfolio management with the low management fees of automated investing. When investors open a managed investment account with Ally Invest, Ally recommends the ideal portfolio based on the investor's specific needs, risk tolerance, and goals. All portfolios are allocated across a wide range of diversified low-cost index funds, and investors have the ability to adjust their risk tolerance at any time. These portfolios are carefully monitored and continually updated based on risk-tolerance and market conditions.

Ally Invest is the brokerage and wealth management offering from Ally that exists alongside the firm's award-winning online banking products. Ally Invest offerings consist of a low-cost trading platform for self-directed investors, as well as a suite of affordable, automatically-managed investment portfolios, both delivered through a fully-transparent online process. The combination of low-cost investing with Ally's competitive deposit products gives customers a powerful value proposition for managing their financial well-being.

### About Ally Financial Inc.

Ally Financial Inc. (NYSE: ALLY) is a leading digital financial-services company with assets of \$180.1 billion as of March 31, 2019. As a customer-centric company with passionate customer service and innovative financial solutions, we are relentlessly focused on "Doing it Right" and being a trusted financial-services provider to our consumer, commercial, and corporate customers. We are one of the largest full-service automotive-finance operations in the country and offer a wide range of financial services and insurance products to automotive dealerships and consumers. Our award-winning online bank (Ally Bank, Member FDIC and Equal Housing Lender) offers mortgage-lending services and a variety of deposit and other banking products, including savings, money-market, and checking accounts, certificates of deposit (CDs), and individual retirement accounts (IRAs). We also support the Ally CashBack Credit Card. Additionally, we offer securities-brokerage and investment-advisory services through Ally Invest. Our robust corporate finance business offers capital for equity sponsors and middle-market companies.

For more information and disclosures about Ally, visit <https://www.ally.com/#disclosures>.

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