Ally Invest launches wealth management advisory service

Ally Invest Wealth Management sets new standard with accessible, dedicated financial advice

CHARLOTTE, N.C., May 18, 2022 /PRNewswire/ -- Ally Invest, the online brokerage and wealth management arm of Ally Financial Inc. (NYSE: ALLY), today announced its entrance into personalized advice and portfolio strategies with the launch of its Wealth Management advisory service.

Ally Invest Wealth Management provides personalized, ongoing guidance through a dedicated fiduciary advisor for a minimum of $100,000 in investable assets and a blended advisory fee as little as 0.75-0.85%. Ally's combination of lower fees, lower barrier to entry and personal advisors opens up one-on-one wealth advice to the nearly 15.5 million U.S. households that do not meet the minimum $250K threshold of most firms. In addition to tackling the cost barrier, Ally Invest Wealth Management advisors receive instruction in behavioral finance to best guide people toward their financial goals, ensuring they know the customer not only as an investor, but as a person with a lifetime of experiences that shape how they make decisions about money.

Ally Invest Wealth Management is currently available to existing Ally Bank and Invest customers only, with a release to the general public planned in the coming months.

"We believe people deserve access to personalized, professional financial advice earlier in their lives so they can create a solid plan and take control of their financial future," said Diane Morais, president of consumer and commercial banking at Ally. "Our new wealth management offering makes dedicated, holistic human advisory more accessible by lowering the barriers to entry."

Ally Invest Wealth Management is designed to deliver on customer needs in a way that makes the experience more personal while creating access for more people. The new offering will allow customers to conduct banking and investing in one convenient place and keep the ease and simplicity of a digital experience, while getting the advice they need for their individual financial picture.

Ally Invest Wealth Management's key differentiators include:

- $100,000 minimum assets under care
- A dedicated wealth advisor, well-versed in behavioral finance
- A dedicated concierge support team for account questions
- Holistic advice on the customer's complete financial picture, including assets held outside of Ally
- Seamless digital integration with other Ally accounts
- A simple, aggregated view of each client's entire net worth

"Our human-centric, behavioral approach to the client conversation aims to disrupt the industry," said Nicole Cope, senior director, Ally Invest Advisors. "We look beyond the individual's assets and get to know them as people with particular wants and needs and who come with a host of experiences that shape how they make financial decisions. This deeper understanding enables us to better tailor investment advice and offer choices that will successfully advance them toward their goals."

To learn more about Ally Invest Wealth Management, visit ally.com/invest/wealth-management.

About Ally Invest
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 Bank's competitive deposit products gives customers a powerful value proposition for managing their financial wellbeing. Securities products and services are offered through Ally Invest Securities LLC, member **FINRA**/**SIPC**. You can find background on Ally Invest Securities at **FINRA's BrokerCheck.** **View Security Disclosures**. Advisory services are offered through Ally Invest Advisors Inc., a registered investment adviser. **View Advisory Disclosures**. Ally Invest Advisors and Ally Invest Securities are wholly owned subsidiaries of Ally Invest Group Inc. Ally Bank and Ally Invest Group are wholly owned subsidiaries of Ally Financial Inc. Securities products are **NOT FDIC INSURED, NOT BANK GUARANTEED,** and **MAY LOSE VALUE**.

About Ally Financial
Ally Financial Inc. (NYSE: ALLY) is a digital financial services company committed to its promise to "Do It Right" for its consumer, commercial and corporate customers. Ally is composed of an industry-leading independent auto finance and insurance operation, an award-winning digital direct bank (Ally Bank, Member FDIC and Equal Housing Lender, which offers mortgage lending, point-of-sale personal lending, and a variety of deposit and other banking products), a consumer credit card business, a corporate finance business for equity sponsors and middle-market companies, and securities brokerage and investment advisory services. Our brand conviction is that we are all better off with an ally, and our focus is on helping our customers achieve their strongest financial well-being, a notion personalized to what is important to them. For more information, please visit www.ally.com and follow @allyfinancial

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