



Plain Wealth

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PLAIN WEALTH ANNOUNCES PARTNERSHIP WITH THE #1 CRM IN WEALTH MANAGEMENT AND LAUNCHES PLAIN WEALTH APP

Old Town-based fintech to launch client engagement SaaS platform with industry giant.

Wichita, KS, August 3, 2021: Plain Wealth, a technology-focused innovation firm in Wichita's Old Town, launches the Plain Wealth app, a SaaS app designed to provide a frictionless client wealth experience, in partnership with Redtail, the world's leading CRM in wealth management.

Founders of Plain Wealth previously built a more narrowly focused client platform to step into the wealth management space. Firm leaders and advisor interviews revealed the same challenge, the industry did not have a modern, broad-based platform for clients. The Plain Wealth team leveraged their domain expertise in wealth management and in human factor research to produce a fully tailored, AI-driven client experience, with seamless information and engagement. It includes all of the requisite security and compliance, providing firm-wide disclosures along with the standard of BrokerCheck.

Led by Plain Wealth's CTO Dr. Paul Peloquin and CEO David Thorne, Plain Wealth launches on August 3rd to initial customers, top RIA firms in the Midwest and a Nationally, and a major insurance institution.

"Redtail's partnership for our product launch confirms the value of Plain Wealth," mentioned Thorne, "Wealth management clients have waited long enough. This is a true win for clients and advisors. Now, Redtail can add a world-leading client solution to their larger-than-50% market footprint."

Dr. Peloquin stated, "Plain Wealth offers clients the seamless experience they've been wanting, plain and simple. Just the information they want, financial and informational, and the feel of a closer advisor relationship. We designed the platform so new firms can setup in less than an hour, and pull clients onto the Plain Wealth platform, private labeled for branding, and integrated with their data on Redtail."

Those interested in learning more can go direct to the Plain Wealth website: plainwealth.io, where they can ask for more information, schedule to attend a webinar, request a full demo, or fully order the Plain Wealth app. Larger firms have the option to purchase their own separate app. Plain Wealth costs as low as \$25/month per advisor.

About Plain Wealth

Plain Wealth is a part of the Plain Solutions family of companies, founded in 2018. The company offers award-winning technology and innovation, through a collaborative process. Plain Wealth is committed to client-centric innovation, driving toward financial wellness, and is dedicated to high satisfaction customer solutions and support. For more information, visit plainwealth.io.

About Redtail

Founded in 2003, Redtail Technology is a leading provider of web-based Client Relationship Management (CRM) solutions in the financial services industry. The company is dedicated to helping advisors efficiently grow their firms by providing them with the core technologies that drive their day-to-day operations, offering low cost and easy to implement applications and integrating with many of the industry's most widely used applications. For more information, visit redtailtechnology.com.