

## NEWS

For immediate release



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# Ezra Group Launches Recognition Program to Highlight Excellence in Wealth Management Software Integrations

*Industry metric to honor providers who demonstrate superior integration capabilities is first-of-its-kind*

NEW YORK, NY (November 28, 2023) – [Ezra Group, LLC](#) (Ezra Group), a strategy consulting and research firm that has provided technology and operations advice to the wealth management industry since 2005, announced the launch of a new recognition program for their industry standard [Ezra Group WealthTech Integration Score™](#). The WealthTech Integration Scores support better decision-making for wealth management firms when evaluating new applications and help software vendors better serve their clients with improved integrations. [The Ezra Group WealthTech Integration Recognition Program](#) is designed to distinguish and honor software providers that demonstrate superior integration capabilities. The new recognition program gives software providers another way to promote their outstanding integration capabilities, as verified by Ezra Group, a trusted third party in the financial services industry.

## BADGES OF DISTINCTION

The recognition program highlights wealhtech vendors with integration scores within the top two quintiles, Excellent and Superior. This program will affirm each vendor's commitment to providing integrated solutions that enhance connectivity and operational efficiency for wealth management firms.

**Vendors who are invited to participate in the program will have access to a wide range of benefits, including:**

- **Use of an Ezra Group WealthTech Integration Score Badge:** Awardees earn the right to display an Ezra Group WealthTech Integration Score Badge across all their digital platforms,

including websites, social media, email campaigns, and other branded marketing materials.

- **Promotion of Marketing Content:** Awardees can upload customized marketing content to be featured on the WealthTech Integration Score Landing Page at EzraGroup.com, including the ability to promote direct links to their products, thus enhancing visibility and client engagement.
- **Quarterly Research Insights:** Exclusive invitations to quarterly virtual calls where Ezra Group's latest research, analysis, and perspectives on integration and wealthtech trends will be presented.
- **Access to Proprietary Research Reports:** Ezra Group research reports, offering critical industry insights and competitive intelligence, will also be available for download to program members.

### **AN IN-DEPTH, TRANSPARENT SCORING PROCESS**

Ezra Group's WealthTech Integration Score is meticulously calculated based on an in-depth assessment of each application's integrations across multiple criteria, reflecting breadth, depth, security, and developer support. This assessment draws from a comprehensive analysis of over 4,500 integrations across more than 450 applications, ensuring a thorough and fair evaluation.

The Recognition Program not only underscores ranked firms' robust integration capabilities but also makes it easier for wealth management firms to build a more connected and reliable technology stack, boosting their brand and increasing market opportunities with both clients and advisors.

### **ABOUT EZRA GROUP**

Ezra Group provides technology and business research, information, and advice to banks, broker-dealers, asset managers, private equity and fintech firms. Anchored by an 18-year track record, clients look to them for specialized industry expertise to optimize their platforms, processes, and products and super-charge business growth.

Under the leadership of founder and CEO Craig Iskowitz, Ezra Group delivers deep knowledge from their robust team of industry veterans. Ezra Group publishes original blogs, articles, podcasts, and newsletters that inform and educate enterprise wealth management firms, financial services organizations, technology vendors, and financial advisor audiences.

To learn more about how they help clients transform, visit <https://EzraGroup.com>.

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