NEWS

For Immediate Release

Media Contact:
Jonny Swift
Impact Communications, Inc.
913-649-5009
JonnySwift@ImpactCommunications.org

Libretto Launches New Insights Hub for Financial Advisors

'Total wealth' advice platform also named a finalist in five categories of the 2026 ThinkAdvisor Luminaries Awards

LOS ANGELES, CA (September 30, 2026) – Libretto, the 'total wealth' advice platform for RIAs and family offices, has launched Libretto Insights, a new educational hub featuring content and resources for financial advisors and wealth managers.

Libretto's Insights page features educational articles, webinars, podcasts, videos, interviews, news, and other thought leadership content exploring concepts related to Libretto's differentiated approach to financial planning and investing.

Originally designed to manage ultra-high-net-worth clients, Libretto captures a holistic picture of each client's lifetime wealth, inclusive of private assets, liabilities, and future inflows. It then connects planning to portfolios and risk management, considering liquid investments as a "completion portfolio" that addresses the client's unique objectives and risks. In doing so, Libretto empowers advisors to deliver sophisticated solutions for clients of all wealth levels.

Libretto's distinctive financial planning methodology is reflected across the content and resources available on its Insights page. Topics include managing clients' total wealth, valuing human capital, working with UHNW clients, reimagining risk management, going beyond the Monte Carlo, AI's increasing role in wealth management, and more.

"Technology alone doesn't create better advice," said **Jeffery Coyle**, Founder and CEO of Libretto. "Advisors also need a framework for thinking differently about planning, investing, and risk. Libretto Insights gives us a place to share more of that education with the advisor community."

To learn more and access Libretto's Insights page, please click here.

LIBRETTO NAMED THINKADVISOR LUMINARIES AWARDS FINALIST

Libretto was recently named a finalist in five categories of the 2026 *ThinkAdvisor* Luminaries Awards, an industry awards program that recognizes the visionary firms and individuals driving innovation and making a transformative impact in the wealth management industry. This is the second consecutive year that Libretto has been named a finalist in the Luminaries Awards.

Libretto was named a finalist for Thought Leadership & Education in Financial Planning, as well as Product or Service Innovation in four categories: Financial Planning, Investment Management, Operations, and Client Engagement.

Over the past 18 months, Libretto has expanded both its educational resources and its advice platform, introducing new capabilities including AI-assisted data entry and client onboarding, its AI assistant Mert, and personalized client letters.

"We're honored to be recognized across both thought leadership and product innovation," said Coyle. "We believe advisors need both better technology and better frameworks for delivering advice, and those two priorities continue to guide the work we're doing at Libretto."

Winners of the 2026 Luminaries Awards will be announced at an in-person awards ceremony at the New York Hilton Midtown in New York City on December 3, 2026. Recognition is based on third-party award criteria and is not indicative of future results, performance, or the skill of any advisor using Libretto. No compensation was provided for obtaining this recognition. See endnote 1 for methodology and disclosures.

To learn more and see the full list of 2026 *ThinkAdvisor* Luminaries finalists, please click here.

ABOUT LIBRETTO

Libretto is a powerful advice platform that helps financial advisors make every client feel like they're worth $100 million. Originally built to manage ultra-affluent clients, Libretto brings advanced liability-driven planning, asset allocation, and risk management tools to advisors serving clients at every wealth level. Libretto scales 'total wealth' advice across an advisor's full client base, making it easy for advisors to deliver sophisticated advice to both their largest and smallest clients. Learn more at Libretto.io.

Libretto is a registered investment adviser with the U.S. Securities and Exchange Commission ("SEC"); however, such registration does not imply a certain level of skill or training and no inference to the contrary should be made. Libretto provides advisory services to registered investment advisors and other professional advisors and does not advise individual clients. Individuals should consult their personal financial advisor or a licensed securities professional before investing. Information about Libretto, including the services provided, the types of clients Libretto accepts, and fees charged, is available on Libretto's Form ADV Part 2A, which can be obtained by going to www.adviserinfo.sec.gov.

[1] Libretto was named a Finalist in five categories of the 2026 ThinkAdvisor Luminaries Awards: Product or Service Innovation in Financial Planning, Investment Management, Operations, and Client Engagement, and Thought Leadership & Education in Financial Planning. The awards are presented by ThinkAdvisor, and the Finalists were announced on 8/24/2026. The awards program recognizes the visionary firms and individuals driving innovation and making a transformative impact on both the financial services industry and profession. Winners are selected based on submitted materials by a panel of independent judges made up of industry professionals. No

compensation was provided directly or indirectly by Libretto in connection with this award. This recognition is not indicative of future results, performance, or the skill of any advisor using Libretto, and it should not be construed as an endorsement of Libretto by the award sponsor.

###