NEWS
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Softlab360 Joins The Wealth Mosaic, Adds Strategic Partnership Exec, Earns Luminaries Recognition

CEO Henry Zelikovsky to join the "Buy, Build, Rent" panel at Nasdaq MarketSite November 2nd

NEW YORK, NY (October 28, 2026) – Softlab360, an end-to-end software development and engineering partner for wealth management and fintech firms, today announced three milestones that broaden its role in the wealth management ecosystem. The firm has joined The Wealth Mosaic (TWM), the global wealth management solutions network, and brought on wealthtech executive Patrick Spencer, Founder and CEO, Spencer Business Strategies, LLC, to lead strategic partnership development on a fractional basis. In addition, *ThinkAdvisor* has named the firm a finalist for the 2026 Luminaries Awards for its engineering work on Blue Vault's Alternative Investment Research Portal.

"Many wealth management firms know what they want their technology to do. The harder part is turning that strategy into systems that work together," said Henry Zelikovsky, founder and CEO of Softlab360. "These milestones put us in more of the conversations where those decisions are made. That includes the consultants who guide strategy, the enterprises that are ready to build and the peers working through the same questions. Our role is to contribute our experience to these discussions while rationalizing what can be built, how, and with what benefits. We bring hands-on engineering to the table while a firm is deciding and once it has decided what needs to happen."

BRINGING THE BUY-OR-BUILD CONVERSATION TO THE WEALTH MOSAIC

As a new member of TWM, a global network that connects wealth managers with the technology and solution providers that serve them, Softlab360 gives wealth management firms a direct line to a partner that can do more than recommend technology. The firm can help them make new and existing solutions work together.

Most wealth managers rely on many systems, including custodians, portfolio management systems, financial planning tools, CRMs, trading platforms and document systems. Each new solution a firm adopts has to connect with the others so data flows intelligently and is applied

based on its meaning. Through TWM, Softlab360 can share its experience with integration, data engineering and AI-driven workflows across the interconnected elements of this network. The company opens the door to collaboration with other participating members to help firms modernize gradually, without a full rip-and-replace.

"The Wealth Mosaic brings the whole ecosystem into one place: wealth managers, technology providers and the people advising them," said Zelikovsky. "That's exactly where integration questions come up. We want to be part of those conversations early, so firms can see how the pieces fit together before they commit to a direction."

Zelikovsky will bring that perspective to the stage on the panel "Buy, Build, Rent: Where's the Industry in 2026?" at The Wealth Mosaic Live 2026: US, taking place Monday, November 2nd, at Nasdaq MarketSite in New York. Michael Wood, CEO of Domify, and Victor Nieves, enterprise client executive at FIS, will join him on the panel. Hilda Wong-Doo, founding member of Greenline Consultants, will moderate the discussion, which will explore how firms decide whether to buy, build or rent the technology they need. The full-day program is expected to bring together about 250 executive delegates and more than 40 speakers across 15 sessions focused on AI, the RIA operating model, investment allocation and technology strategy.

"Buy, build or rent is rarely an all-or-nothing choice," said Zelikovsky. "No firm can buy everything exactly the way it needs it, and every firm has to modernize over time. The better questions are what to connect, what to modernize, what to keep and where custom engineering creates a real advantage. I'm looking forward to a practical conversation about how firms make those decisions."

See the full profile here: https://www.thewealthmosaic.com/vendors/softlab360/

PATRICK SPENCER TO BRIDGE WEALTHTECH STRATEGY AND ENGINEERING

Patrick Spencer has joined Softlab360 as fractional head of strategic partnerships and is building relationships with wealthtech consultancies, enterprise wealth management firms and RIAs. Each of these groups is working through when to buy, when to build and how to make existing systems work together.

His focus is on advisory and consulting firms led by former wealth management and banking executives. These firms help clients decide what to modernize. Softlab360 is positioned to complement that guidance with the senior engineering team that builds, integrates and supports the solution. Spencer is also introducing Softlab360 to enterprise firms and platforms that are investing in their own technology.

Spencer brings more than 20 years of experience in fintech and B2B software, with a focus on go-to-market strategy, revenue growth and aligning product, marketing and sales teams. As a former Moneytree Software executive, he helped transform a legacy calculation engine into a cloud-native, advisor-centric platform. He also heads the Strategic Advisory Board at a-Squared Technology Partners.

"What I admire about Henry is that he leads with his expertise. He works alongside executives while they're still deciding what should be built, and his team takes the time to truly understand their clients' solutions. That's a different approach than I've seen before. With senior engineers

who have real wealth management experience, Softlab360 is the kind of partner these firms need, and I'm glad to be introducing them," said Spencer.

LUMINARIES FINALIST FOR ENGINEERING DATA PLATFORM BEHIND BLUE VAULT'S ALTERNATIVE INVESTMENT RESEARCH PORTAL

ThinkAdvisor named Softlab360 a finalist in the Investment Management – Product or Service Innovation category of its 2026 Luminaries Awards. Blue Vault is also a finalist in the category. The nomination recognizes Softlab360's role in designing and building the Snowflake-based data engine and infrastructure behind Blue Vault's Alternative Investment Research Portal, which launched in February 2026.

Using Blue Vault's research, Softlab360 engineered a platform to service advisors, sponsors, and WealthTech platforms, and Enterprise Data Distributors. Advisors use a modern, visual data analytics platform to research, compare and monitor alternative investments, including nontraded REITs, nontraded BDCs, interval funds, tender offer funds and Delaware Statutory Trusts. Sponsors can track their ranking and assess who is interested in their offering. Enterprises can connect to the same data through Snowflake or web APIs, supporting their use of the data in their own environments, within their own research, and data aggregation and data visualization systems. The solution supports Tableau, Power BI, Sigma, Snowflake, Streamlit, or proprietary systems.

"We're honored to share this recognition with Blue Vault," said Zelikovsky. "Blue Vault built deep, independent research in alternatives. Our role was to enhance the value of this research by bringing interactive access to its subscribers, enabling them with historical view and comparative analysis of funds by sponsors, across every metric and each reporting period, at enterprise scale. It's a strong example of how the right data foundation can serve advisors and institutions at the same time."

The winners will be announced at the 2026 Luminaries awards ceremony on December 3, 2026, at the New York Hilton Midtown.

ABOUT SOFTLAB360

Softlab360 (formerly Starpoint Solutions) is headquartered in New York and has built production software since 2000. Led by CEO and founder Henry Zelikovsky, a veteran in the software development and engineering space, the firm handles complex, mission-critical systems for wealth management, fintech, and financial services to help them connect fragmented systems, unify data, modernize legacy platforms, and put AI to work in their existing technology environments. Learn more at www.Softlab360.com.

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