NEWS

For Immediate Release

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YCharts Names Industry Veteran Steve Bendt as Chief Marketing Officer

Fintech marketing veteran joins top investment research and client engagement platform to accelerate growth and strengthen YCharts' market leadership

CHICAGO—[August 18th]—YCharts, a leading investment research and client engagement platform trusted by thousands of financial professionals across North America, today announced the appointment of Steve Bendt as Chief Marketing Officer. He will lead YCharts' global marketing organization, reporting to CEO Sean Brown, with responsibility for brand, demand generation, and go-to-market strategy across the company's RIA, enterprise, and asset manager markets.

Bendt joins YCharts with nearly 30 years of marketing experience, including CMO roles at industry leading investment research and fintech companies, bringing a track record of building high-performing teams inside high-growth financial data and investment research businesses.

"Steve's background is a rare combination for this role. He has scaled marketing through exactly this kind of growth stage before, and he knows the wealthtech and investment research categories from the inside," said Sean Brown, CEO of YCharts. "That combination of growth marketing discipline and industry fluency is what we need as we build on significant product innovation, including Y, our specialized AI agent, and growing industry recognition across the entire advisor workflow, highlighted by our recent five-category T3 / Inside Information Software All-Star distinction."

"YCharts has real product-market fit and a customer base that keeps growing – a foundation most companies spend years trying to earn," said Bendt. "I understand both the opportunity in front of this team and what it takes to capture it. I'm looking forward to working with Sean and the team to take the strong

foundation they've already built and accelerate it into the next stage of growth."

Based in Seattle, Bendt officially joined YCharts on August 11, 2026.

ABOUT YCHARTS

YCharts is a top-ranked investment research and client engagement platform that enables financial advisors and asset managers to make smarter investment decisions and better communicate with clients. Trusted by over 15,000 financial professionals and recognized as the Investment Research market leader by Kitces research, YCharts delivers intuitive tools for security research, portfolio construction, AI-enabled proposals, client communication, and market monitoring. In the 2026 T3 / Inside Information Technology Survey, YCharts was named a "Software All-Star" across five categories. YCharts also earned a 2025 Wealthie Award for its AI Chat feature and has been recognized ten consecutive times on the Inc. 5000 list of America's fastest-growing private companies. Learn more at www.ycharts.com.

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