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## **Ategenos Capital Announces Launch of Investment Advisory Solutions**

The newly formed firm comprised of industry professionals is now registered with the SEC and will be providing discretionary investment advisory solutions to the marketplace.

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**BERWYN, Pa. – June 20, 2023** – [Ategenos Capital](#) (“Ategenos”), a firm built to partner with financial institutions to deliver investment advisory solutions and concierge advisor service, today announced they have received approval from the Securities and Exchange Commission to be a registered investment adviser.

Ategenos will now offer discretionary investment advisory solutions under the oversight of co-Chief Investment Officers Jeff Raupp, CFA, and Amy Magnotta, CFA. The suite of investment solutions will be distributed to insurance and independent broker-dealer financial advisors as well as registered investment advisors through the Envestnet platform.

“We’re thrilled to usher in the next phase of our business, and I’m glad to have Jeff and Amy collaborating again to manage investment solutions for our clients,” said Jason Moore, CEO of Ategenos. “They are masters of their craft and have had a very successful 20-plus year track record. I’m equally excited to partner with Envestnet, as they have built an innovative wealth tech platform that’s widely used by so many of our prospective clients.”

Ategenos will offer investment solutions focused on both the mass affluent and affluent markets, beginning with their Ategenos Portfolios (\$10,000 minimum), which are model portfolios utilizing third-party ETFs and mutual funds and their Ategenos Access Portfolios (\$500,000 minimum), a discretionary UMA model solution utilizing third-party SMAs and ETFs. These investment solutions will be co-managed by Jeff Raupp and Amy Magnotta.

Ategenos will also launch its Private Wealth offering (\$1 million minimum), a tailored high-net-worth solution providing financial advisors and their high-net-worth clients customized UMA portfolios along with a dedicated portfolio manager to provide ongoing relationship management. This solution will be led by Ategenos Capital’s Head of Private Wealth, Todd Cole, CFA, CFP®.

In addition, Ategenos will continue supporting the growth of international financial institutions establishing operations in the United States via its Global Managed Account Program (“gMAP”)

solution and will also continue providing consultative OCIO services to both registered investment advisors and asset management firms.

Envestnet will be the first platform to offer Ategenos Capital's investment solutions. "Envestnet is a leading platform for asset managers and the 100,000-plus advisors who use our platform," said Rich Aneser, Chief Strategy Officer. "Our company has always strived to transform the way financial advice and wellness are delivered while empowering advisors and their clients. This partnership also provides an opportunity for us to mutually support the growth of international institutions, partnering with asset managers across a spectrum of offerings, and ultimately providing greater value to our clients."

## **ABOUT ATEGENOS CAPITAL**

Founded in 2022 by industry professionals, Ategenos is an independent and objective investment advisory partner providing solutions and concierge-level service for advisors and their investors. Ategenos is focused on providing personalized support to advisors so they can spend more time with their clients. For more information, please visit [www.ategenoscapital.com](http://www.ategenoscapital.com).

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*Ategenos and Envestnet are separate entities. Envestnet, Inc., has a minority investment in Ategenos Capital.*