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WealthBar and PPI announce first-to-market agreement in Canada between a robo-advisor and an insurance advisory

Fintech innovator teams up with leading insurance marketing organization to give advisors access to new investment opportunities for their clients

VANCOUVER, BC – In a first for Canada, WealthBar and PPI are providing a new platform that lets PPI advisors deliver a far-ranging suite of investment options.

“Our mission is to make investing easier for all Canadians,” said Tea Nicola, CEO and Co-Founder of WealthBar. “By working together with a leader in the insurance marketing field, we’ll be able to help far more people. Through a new advisor platform called *PPI Valet*, powered by WealthBar, independent advisors can bring an added value service option to their clients. For consumers, our portfolios offer competitive performance, lower fees and diversification to reduce market volatility.”

“We’re excited that the advisors who work with us will add more choice and convenience for their clients through WealthBar’s innovative robo-advisor,” said Jim Virtue, President and CEO of PPI Solutions. “Advisors will introduce their clients to an easy-to-use investment option with access to low cost and professionally managed portfolios. For advisors, it’s more convenient. WealthBar takes care of monitoring and rebalancing accounts, as well as regulatory compliance.”

When *PPI Valet* launches this fall, the new advisor platform will provide a range of marketing support and online tools as a value-add for advisors.

“By providing advisors with special access and enhanced support through *PPI Valet*, we are rounding out our current investment sales options for advisors,” Virtue said. “Advisors will be able to offer an all-in-one experience in their practice.”

That gives advisors working with PPI a new way to grow their online practice, engage with a tech-savvy demographic, as well as an opportunity to offer a new alternative for investors looking for lower-fee options.

About WealthBar

WealthBar is Canada's first full-service online robo-advisor. They help Canadians build their brightest future possible through easy, low cost investing. WealthBar brings private wealth management expertise to investors, whether they have \$5,000 or \$5 million. Clients get diversified portfolios, financial planning tools, an easy-to-use online investor dashboard and much more.

About PPI

PPI connects advisors and their clients with precisely what they need to achieve leading-edge financial solutions. As an insurance marketing organization, PPI offers actuarial, tax and specialized expertise in all aspects of life insurance, and specifically in its design and custom application. PPI delivers the calibre of estate planning and technical support for advisors that helps Canadians to plan ahead.

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