

For immediate release

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Oppenheimer Asset Management, Redi2 Integrate to Better Serve Financial Advisors

*Process Efficiencies, Fee Disclosure, Ability to Scale
Drive Decision*

BOSTON and NEW YORK [Dec. 5, 2017] – [Redi2 Technologies](#), the premier provider of hosted fee billing and revenue management solutions to the global financial services industry, announced its integration with [Oppenheimer Asset Management](#), an affiliate of Oppenheimer & Co. Inc., a leading investment bank and full-service investment firm providing investment banking, financial advisory services, capital markets services, asset management, wealth management, and related products and services worldwide.

The collaboration of these two financial service industry leaders will provide enhanced functionality and improved efficiency in the billing and payout processes, resulting in a superior user experience for the Oppenheimer advisory community.

“Redi2’s Wealth Manager Enterprise platform is architected to allow clients to define fee calculation at both the account and sleeve level and to aggregate those fees across various levels of the firm’s book of business. By calculating these fees discretely, firms can provide their clients the transparency required in today’s financial regulatory environment,” said Redi2 Managing Director of Wealth Management Tom Huddleston. “Our focus on specifically addressing the unique concerns of wealth managers such as Oppenheimer & Co. made us an excellent match for their billing and payout needs. We look forward to working with them in support of their advisor clients.”

“One of my primary objectives has been to improve the coordination, integration and delivery of our asset management capabilities and to provide a better experience for our advisors,” said Bryan McKigney, President of Oppenheimer Asset Management, Inc. “The enhanced efficiency achieved through the integration of Redi2’s outstanding WME platform is a leap forward in achieving those goals.”

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ABOUT REDI2 TECHNOLOGIES, INC.

Headquartered in Boston, Redi2 Technologies offers a comprehensive, SaaS revenue management platform to the global financial services industry, serving investment management firms with aggregated assets under management of more than \$5.5 trillion. Since its 2002 founding, Redi2 has leveraged technology to automate client reporting, fee billing and invoicing for wealth and investment managers. Redi2 is a Software as a Service (SaaS) pioneer and a market leader in vendor-hosted fee billing for firms of all sizes. For more information, visit www.redi2.com.

ABOUT OPPENHEIMER & CO. INC.

Oppenheimer & Co. Inc. (Oppenheimer), a principal subsidiary of Oppenheimer Holdings Inc. (OPY on the New York Stock Exchange), and its affiliates provide a full range of wealth management, securities brokerage and investment banking services to high-net-worth individuals, families, corporate executives, local governments, businesses, and institutions. For more information, visit www.opco.com.

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