



News Release

Waddell & Reed, Inc. Creates New Advisor Desktop Application

WaddellONE offers single sign-on access to range of data, information

Overland Park, KS, May 20, 2019 – As it continues to boost its technology infrastructure in tandem with its progress toward an enhanced advisor experience, Waddell & Reed, Inc. today launched WaddellONE, a centralized advisor desktop platform available to all associated financial advisors.

Through one desktop solution, WaddellONE gives advisors direct connectivity to several of the firm’s existing technology partners – including Albridge Wealth Reporting, eMoney, Envestnet and its Advisor Compensation Management system.

WaddellONE combines access to existing quick-link and online applications – with the added benefit of market data, research, and news coverage – in one location. It not only brings access to a range of data and services -- including client, product, processing, even reporting – but is scalable, allowing the capture of added applications in the future.

“This simplifies advisors’ access to client data and various key metrics that not only helps them best serve clients, it helps them continue to manage and build their business by consolidating and integrating applications,” said Phill Fournier, Senior Vice President, Advisor Experience for Waddell & Reed, Inc.

It was initially introduced to a small pilot group of advisors and field leaders over the last two months, who then provided feedback and ideas on usage and adaptations, prior to this week’s rollout to the full network of advisors. WaddellONE is built utilizing the capabilities of Thomson ONE, an industry-leading application available through Refinitiv (formerly the Financial and Risk Business of Thomson Reuters).

“The feedback has been valuable, extremely positive, and it validates the progress we’ve made in the last several months to consistently build a stronger advisor experience and support system across the firm,” said Shawn Mihal, President of Waddell & Reed, Inc.

WaddellONE is a key part of an incremental series of enhancements the firm will implement as part of its Business Administration Program (BAP) through 2020. Additional components will include enhanced reporting, improved data analytics, and a simplified business submission processes.

Mihal noted that it’s another step in the strategic evolution of Waddell & Reed’s wealth management business, focused on improving its advisor experience through technological enhancements, product expansion and broadening support. Waddell & Reed, Inc. is one of the pioneers of the planning industry, founded more than 80 years ago.

About Waddell & Reed

Founded in 1937, Waddell & Reed, Inc. is one of the oldest financial planning firms in the U.S., providing total planning services to clients throughout the United States through a network of independent financial advisors. It is a subsidiary of Waddell & Reed Financial, Inc. (NYSE: WDR).

###