**Choreo Chooses Pontera to Strengthen Client-First Approach**

**with Held Away Asset Management**

*Pontera’s technology allows Choreo’s financial advisors to manage and trade clients’ 401(k) and other held away accounts as part of their holistic strategies*

**CHICAGO / NEW YORK – November 9, 2022 –** [**Choreo, LLC**](https://c212.net/c/link/?t=0&l=en&o=3665839-1&h=3945647405&u=http%3A%2F%2Fwww.choreoadvisors.com%2F&a=choreoadvisors.com.) –an independent registered investment adviser (RIA) focused on designing and building financial solutions that improve the well-being of clients, their families and the communities where they live – announced that it has partnered with financial technology company [**Pontera**](http://pontera.com/) to enable its financial advisors to securely and compliantly manage clients’ held away accounts, including 401(k)s, 403(b)s, and HSAs.

Following the [**recent launch of a digital marketing platform**](https://www.prnewswire.com/news-releases/choreo-partners-with-fmg-to-launch-canvas-a-new-digital-marketing-platform-to-support-financial-advisor-growth-301639966.html) in partnership with FMG, Choreo has engaged with Pontera to enhance its growing tech stack, elevating the client experience. Choreo advisors can now attain greater insight into the entirety of their clients’ assets, reallocating across retirement accounts more quickly and effectively. Pontera’s proprietary technology provides advisors with held away account data to offer more comprehensive performance reporting and billing for client portfolios.

“At Pontera, we aspire to bridge millions of Americans to better retirement by empowering their financial advisors to employ holistic allocation strategies across the entire client portfolio,” said [**David Goldman**](https://www.linkedin.com/in/mrdgoldman/)**, Pontera’s Chief Business Officer**. “We are pleased to now be a part of Choreo’s offering, enabling its wealth advisors to improve retirement savers’ wellbeing.”

Choreo [**launched in February 2022**](https://www.businesswire.com/news/home/20220222005785/en/Newly-Independent-Advisory-Firm-Choreo-Announces-the-Closing-of-Previously-Announced-Transaction) when Parthenon Capital, together with Choreo management and advisors, purchased the company from one of the largest CPA and professional services firms in the country. Choreo’s team of advisors provide comprehensive wealth management and retirement plan advisory services to approximately 3,600 families. The firm manages over $11.8 billion1 in assets and has 28 locations across 18 states.

“This partnership with Pontera is a part of Choreo’s ongoing effort to invest in cutting-edge technologies that facilitate strong, highly collaborative relationships with clients,” said [**Larry Miles,**](https://www.linkedin.com/in/larry-miles-jr/) **CEO at Choreo.** “We are excited that our advisors will now be able to more effectively integrate held away accounts like 401(k)s, providing a more complete and transparent view into a client’s portfolio and make it easier for them to achieve their retirement goals.”

Pontera is a SOC 2 certified platform trusted by advisors to ensure that client data is protected, and that the client retains ultimate control of their accounts. Please visit [**pontera.com**](https://www.pontera.com/) to learn more about how Pontera helps advisors meet client needs.

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1All numbers are approximate. As of April 30, 2022, $9.5B constitutes Choreo’s regulatory assets under management, with an additional $2.3B in assets under advisement related to holdings of clients for which we provide aggregated reporting, financial planning, wealth management consulting, retirement plan consulting and advisory services, and/or similar services.

**About Choreo, LLC**

Choreo is an independent firm focused on redefining the RIA's place in the wealth advisory industry. Passionate about improving the well-being of clients, their families and their communities, Choreo operates out of 28 locations across the country. Choreo's experienced advisors define, design and build solutions for their clients' financial and related needs so they can focus on what matters most to them. Originally launched over 20 years ago as a subsidiary of one of the largest CPA and professional services firms in the country, Choreo serves over 3,600 families with approximately $11.8 billion of assets under management or advisement (as of April 30, 2022). For more information, visit [**choreoadvisors.com.**](https://c212.net/c/link/?t=0&l=en&o=3665839-1&h=3945647405&u=http%3A%2F%2Fwww.choreoadvisors.com%2F&a=choreoadvisors.com.)

**About Pontera**

Pontera (formerly FeeX) is a Fintech company on a mission to be the bridge to a better retirement for millions of Americans by enabling financial advisors to manage, trade and report on their clients' held away accounts, including 401(k)s, 403(b)s, HSAs and more. The platform is designed to work across account types and integrate seamlessly into existing technology to help advisors improve their clients' financial outcomes. Founded in 2012 as FeeX, Pontera is headquartered in New York City. Learn more at [**Pontera.com**](http://pontera.com/)**.**

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