F2 STRATEGY

Fact Sheet

2021

UPDATED 12/31/21

FOUNDED IN

2016

We were founded in 2016 in Silicon Valley, CA

OWNERSHIP

100%

We are a corporation with 100% ownership by spouses Liz & Doug Fritz

REACH

29

Our reach extends 29 U.S. states and 5 countries.

EMPLOYEES

22

We have 22 employees based in 13 states and our chairman is in the UK.

HEADQUARTERS

Remote

We are a fully remote organization with the founders located in Silicon Valley and our leadership team has home headquarters based on their personal choice in Minneapolis, NYC, San Francisco and London.

YEARS AVERAGE EXPERIENCE

20

Our leadership team brings an average of 20 years experience working for some of the most credentialed RIA, wealth and asset management, family office and financial technology firms in our industry.

COMPANY OVERVIEW

F2 Strategy, creator of Outsourced CTO (OCTO), is a WealthTech management consulting firm helping complex RIA, wealth, bank/trust and family office firms improve their technical capabilities to build exceptional client and advisor experiences. Led by former executives of a wide range of top-rated wealth firms and family offices, F2 Strategy combines their results-driven management strategy with industry-leading, proprietary research to create customized high-tech solutions.

A diverse, creative, and people-centric company, F2 Strategy believes the right technology has the power to support, elevate, and empower us all to reach the highest level of fulfillment. F2 Strategy was founded in 2016 in Silicon Valley, currently has 22 employees, and works with firms representing $1.7T in AUM.

OUR SERVICES

Project-Based Engagements

For mid to large size firms that have outgrown their legacy systems and need to scale, F2 Strategy works as a strategic partner to help improve data architecture and create customized, exceptional digital experiences for advisors and clients. Our research-based approach highlights industry and institutional-specific gaps to help differentiate and drive our partners forward.

- CLIENT RELATIONSHIP MANAGEMENT
- FINANCIAL PLANNING
- PORTFOLIO MANAGEMENT
- ACCOUNT MANAGEMENT
- REPORTING
- DIGITAL EXPERIENCE
- DATA ARCHITECTURE
- INFRASTRUCTURE

Strategic Retainer & Outsourced Strategy (OCTO)

To compete in today's market, growing firms need technology innovation too. That's why we built Outsourced CTO ("OCTO"). F2 Strategy's proprietary all-in-one solution is a flexible and fully customizable technology implementation solution that provides C-level oversight and management for smaller organizations looking to innovate within their firm. OCTO firms have access to our entire bench of expertise and solutions to augment their current team at a fraction of the cost.

Within the framework of a long-term retainer partnership, our clients gain:

- EXPERT GUIDANCE
- FLEXIBLE RESOURCES
- INCREASED CAPACITY

OUR MISSION

Do Good With Tech

F2 Strategy believes the right technology has the power to support, elevate, and empower us all to reach the highest level of fulfillment. Most importantly, our team of experts have sat in our clients' seats. We understand the opportunities and challenges in front of them. Our expertise and approach differentiate us from traditional management consulting firms.

OUR CLIENTS

We have the honor of serving complex RIA, wealth, bank/trust and family office firms in the U.S., European, Canadian and Latin American wealth markets.

OUR PEOPLE

At the heart of our mission are creative and passionate humans. We are problem-solvers and listeners. Strategists and doers. Friends and confidantes. Rooted in family values. And we have the privilege of building a team of people around the world to deliver upon this excellence.

OUR PROPRIETARY RESEARCH

F2 Strategy operates in an evidence-based consulting model; conducting intellectual and advisory-based research on technology and business issues which drives informed strategy and decisions for our clients. Our solutions include Voice of the Client and Voice of the Advisor sentiment surveys, Digital Readiness Assessments and benchmarking exercises.

In addition to research that originates from client and vendor partnerships; we gain valuable insights from our exclusive, invite-only WealthTech Executive Forum that represents 100+ of the top C-level wealth technology decision makers and $13T+ in investible assets. Each year, the group holds five in-person meetings at locations around the country and six virtual meetings for deep-dive discussions on a variety of topics in confidential settings.