



Rockefeller Capital Management Leverages FactSet to Drive Advisor Productivity and Recruitment

September 8, 2022

NORWALK, Conn., Sept. 08, 2022 (GLOBE NEWSWIRE) -- FactSet (NYSE:FDS) (NASDAQ:FDS), a global provider of integrated financial information, analytical applications, and industry-leading services, today announced that Rockefeller Capital Management is utilizing FactSet's advisor workstations across the enterprise to drive advisor productivity and support the firm's recruitment efforts.

The agreement provides Rockefeller advisors with access to comprehensive, multi-asset content, robust analytics, and global market data through FactSet's innovative web and mobile solutions.

The collaboration represents a key milestone as Rockefeller plans to more than double its 450-Advisor and Team Members by leveraging FactSet's open and flexible technology and enterprise wealth management solutions.

"The FactSet team has been integral to our advisors' success," said Mark Alexander, Chief Technology and Operations Officer at Rockefeller. "We are pleased to work together and use FactSet's market-leading solutions to enhance the advisor experience as we continue to grow."

FactSet's research, analytics, and market data integrated with Rockefeller's internal solutions creates a seamless advisor experience. The integration supports advisors' productivity and efficiency by delivering tailored and actionable insights to enhance their client engagement efforts.

"Our continued collaboration with Rockefeller is a great example of how FactSet's enterprise wealth management solutions, combined with our open and flexible technology, provides a robust and differentiating advisor experience," said Goran Skoko, Executive Vice President, Head of Research and Advisory Solutions at FactSet. "We are proud to serve as the primary market data provider to support Rockefeller in achieving its growth objectives."

For more information on FactSet's wealth management solutions, visit: [Wealth Management Firms | Wealth Management Software | FactSet](#).

About FactSet

FactSet (NYSE:FDS | NASDAQ:FDS) delivers superior content, analytics, and flexible technology to help more than 170,000 users see and seize opportunity sooner. We give investment professionals the edge to outperform with informed insights, workflow solutions across the portfolio lifecycle, and industry-leading support from dedicated specialists. We're proud to have been recognized with multiple awards for our analytical and data-driven solutions, with the distinction of having been recently added to the S&P 500, and repeatedly scored 100 by the Human Rights Campaign® Corporate Equality Index for our LGBTQ+ inclusive policies and practices. Subscribe to our thought leadership blog to get fresh insight delivered daily at insight.factset.com. Learn more at www.factset.com and follow us on Twitter: www.twitter.com/factset.

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