



RFG Advisory Expands Model Marketplace Through Strategic Partnership with Syntax Data



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Collaboration introduces low-cost, single-name equity portfolios to enhance personalized investment experiences for clients

BIRMINGHAM, Ala.--(BUSINESS WIRE)--RFG Advisory (“RFG”), an innovator in the wealth management industry committed to serving independent financial advisors and their clients, today announced a strategic partnership with **Syntax Data (“Syntax”)**, a financial data and technology provider offering data-optimized index solutions, to expand the investment solutions available on the **RFG Model Marketplace**. Through this collaboration, RFG advisors can now access a suite of competitively priced, single-name equity portfolios designed to deliver greater customization and enhance long-term client outcomes.

The partnership pairs RFG’s institutional-quality portfolio management with Syntax’s extensive background in equity security selection. The portfolios can be implemented as separately managed accounts (SMAs) and integrated seamlessly with other managers on the marketplace, providing advisors a flexible, scalable way to construct customized client portfolios within an SMA/UMA structure. All trading, rebalancing, cash flow management and tax-loss harvesting are handled by RFG to support operational ease.

“As advisors continue to differentiate through truly personalized investment strategies,

operational efficiency becomes even more critical,” said **Rick Wedell, chief investment officer at RFG Advisory**. “By working with Syntax, we are delivering institutional-quality single-name equity investment management at a highly competitive 18-basis-point SMA fee—while supporting advisors with full trading and implementation services. It’s a powerful step forward in helping advisors build their business without compromise.”

Leveraging Syntax’s disciplined research and portfolio-construction approach, the new equity portfolios are built to provide precise exposure to sectors and companies driving economic growth. With risk management and transparency at the forefront, the integration enables advisors to deliver a tailored investment experience with the goal of aligning each client’s goals and preferences.

“RFG shares our belief that personalization and cost efficiency must go hand in hand,” said **Patrick Shaddow, president and CEO at Syntax Data**. “We look forward to supporting their advisors with differentiated equity strategies that help drive meaningful outcomes for clients, while continuing to innovate alongside the RFG team.”

This partnership reinforces RFG’s commitment to delivering best-in-class investment tools, giving independent financial advisors the scale, flexibility and control they need to grow. Adding these new portfolios complements the firm’s existing model suite and aligns with its mission to empower advisors to deliver a high-touch, white-glove experience backed by sophisticated portfolio solutions.

Advisors who are interested in learning more about partnering with RFG to build their business should visit **rfgadvisory.com**. To learn more about Syntax, please visit **syntaxdata.com**.

About RFG Advisory

RFG Advisory is an award-winning platform dedicated to helping independent advisors build their business without compromise. An innovator in the wealth management industry, RFG equips advisors with the infrastructure, support, and community to thrive while building enterprise value. Every element of the platform is designed to create time and space for what matters most to advisors: serving clients and growing their business. From transition support that averages 39 days or less to integrated marketing, talent and client service resources, streamlined back-office operations, institutional-grade investment management, and modern technology infrastructure, RFG delivers the tools and partnership advisors need to grow efficiently and intentionally. At the heart of RFG is a community of entrepreneurs who share a commitment to excellence, collaboration, and innovation. With access to flexible capital solutions and ownership opportunities, advisors have the freedom to align their business strategy with their long-term vision and build something bigger than themselves. To learn more, visit: **rfgadvisory.com**. For more information on RFG Advisory's awards, please visit **rfgadvisory.com/awards**.

Securities offered by Registered Representatives of Private Client Services (“PCS”). Member FINRA/SIPC. Advisory services offered by Investment Advisory Representatives of RFG Advisory, a registered investment advisor. Private Client Services and RFG Advisory are unaffiliated entities.

Syntax, LLC., is a financial data and technology company that provides direct indexing strategies and rules-based equity models to RFG. Syntax, LLC., Private Client Services and RFG Advisory are unaffiliated entities.

About Syntax Data

Syntax Data is a financial data and technology company that empowers investment managers, wealth advisors, and financial institutions with precise, transparent data solutions that seek to optimize index development, portfolio customization, and investment analysis to drive better investment outcomes. Syntax operates through three segments: Affinity® Data, Syntax Direct, and Syntax Indices. Built on its patented Functional Information System (FIS®) technology inspired by systems sciences, Syntax's solutions are powered by comprehensive, granular, and accurate revenue-derived data available on the market. Learn more at **www.SyntaxData.com**.

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