

## **FOR IMMEDIATE RELEASE**

### **Blue Trust Selects Vident, Brightlight, and Mammoth Technology to Launch Revolutionary Faith-Based Private Investing Platform**

**Atlanta, GA — 9/23/2024** — Blue Trust selected Vident Asset Management (“Vident”) to build a new platform for Blue Trust advisors and clients that provides specialized due diligence and state-of-the-art technology. This platform is designed to provide a unique opportunity for advisors to offer their clients investments that align their financial goals with their faith and values. This first-of-its-kind platform is set to transform the landscape of private investing by offering a comprehensive, faith-driven approach. Brightlight and Mammoth Technology were invited to participate due to their capability of providing a highly curated catalog of private investment funds designed for Blue Trust clients on an innovative technology platform.

#### **Blue Trust Sought Due Diligence that Ensures a Faith-based Alignment of Values**

Due diligence on each private fund is performed by Brightlight, an industry leader in investment research and analysis. Brightlight is renowned for its ethical evaluation processes, ensuring that all investment opportunities meet the highest standards of impact-driven criteria. Its expertise provides an added layer of trust and integrity to the platform, making it a reliable choice for advisors when working with their clients to pursue aligning their money with their faith.

#### **Technology Powered by Mammoth**

Mammoth Technology brings cutting-edge technology and innovative processes, enabling seamless workflows and user experiences. The flexibility of its platform allows for a variety of funds to be offered through a unified experience while keeping the costs low for end investors and optimizing the process for the advisory firms that manage the investments. Mammoth works alongside each firm's tech stack to ensure accurate reporting and improve the confidence and scalability of allocating to private markets.

#### **Blue Trust advisors apply biblical wisdom and technical expertise**

Blue Trust, an Atlanta-based wealth management firm and trust company, oversees \$59 billion in assets under advisement serving for more than 10,000 individuals and families. This endeavor with Vident, Brightlight, and Mammoth Technology underscores Blue Trust's commitment to offering clients innovative and values-aligned investment opportunities.

“We are thrilled with this relationship, which empowers our advisors to better serve our clients that desire to more fully integrate their faith with their finances. This collaboration will enhance our ability to deliver exceptional investment opportunities with best-in-class service,” said Brian McClard, Chief Investment Officer of Blue Trust.

#### **A Platform for RIAs and Broker-Dealers**

The platform is designed for use by registered investment advisors (RIAs) and broker-dealers, providing them with access to a carefully curated catalog of private funds. Funds selected for the platform have undergone due diligence and are seamlessly integrated into a process tailored for advisors to guide client allocations. This process ensures that advisors remain at the

center of transactions throughout the life of the investment, strengthening their client relationships and enhancing service delivery.

### **A Unique Approach to Alternative Investing**

What sets this platform apart from other alternative investing platforms is Mammoth's ability to work with a wide range of fund managers while simultaneously creating a standardized, white-labeled process for advisors and their clients. This approach reduces the cost to end investors and allows advisors to scale the onboarding process, reducing not in good order (NIGO) errors and building trust with their clients. "It's all about helping deepen the relationship between an advisor and their client. When a client completes a subscription agreement on Mammoth, they experience their advisor's brand and guidance every step of the way," said Steve Zuschin, Chief Revenue Officer at Mammoth.

### **Flexibility in Investment Structures**

Mammoth Technology offers flexible processes for private fund limited partner engagement or works with financial advisors and emerging fund managers to create special purpose vehicles that pool client assets. This flexibility allows advisors to tailor investment structures to meet the specific needs of their clients, further enhancing the platform's appeal and usability. The goal is to create an efficient path to allocating to private vehicles while keeping the cost to the end investor down.

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### **About Mammoth Technology**

Mammoth Technology is at the forefront of financial technology innovation, delivering cutting-edge solutions that streamline operations, enhance user experiences, and support the unique needs of advisors and their clients in the alternative investing space.

Visit [mammothtechnology.com](http://mammothtechnology.com) for more information.

### **About Vident**

Vident Asset Management ("Vident") brings expert thinking, technical and operational capability, and seamless execution to a diverse set of partners so they can provide their clients with specialized exposure solutions. The cornerstones of Vident are its accumulated knowledge, technical and operational expertise, and entrepreneurial spirit centered around its people, capabilities, and long-standing relationships with what Vident believes are best-in-class service providers.

### **About Blue Trust**

Blue Trust advisors apply biblical wisdom and technical expertise to help clients make wise financial decisions to experience clarity and confidence and leave a lasting legacy. With \$59 billion assets under advisement and a nationwide network of 17 offices, we offer comprehensive financial services and objective advice to more than 10,000 clients across the wealth spectrum in all 50 states. As of 6/30/24 and subject to change.

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