REGIONS

Investment Solutions. Ready When You Are. Regions Bank Introduces InvestPath Digital Advisor

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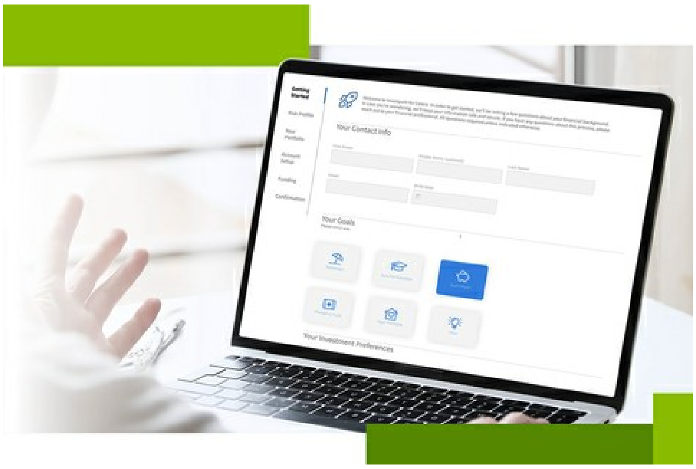
InvestPathdigital advisor makes investing simpler and more accessible for clients at all stages of building wealth.

BIRMINGHAM, Ala.--(BUSINESS WIRE)-- Regions Bank on Tuesday announced the launch of InvestPath™, a digital advisor from Regions Investment Solutions that gives new, emerging, and experienced investors an intuitive and cost-effective online option for building and managing their portfolios while receiving personalized support.

This press release features multimedia. View the full release here: https://www.businesswire.com/news/home/20220607005450/en/



InvestPath offers clients a hybrid approach to investing that blends the convenience of technology with the experience and insights of Regions Investment Solutions financial advisors. (Photo: Business Wire)

InvestPath offers clients a hybrid approach to investing that blends the convenience of technology with the experience and insights of Regions Investment Solutions financial advisors. An InvestPath account may be opened with a low minimum investment of $5,000 and offers a straightforward annual fee of 0.70%. A Regions Investment Solutions financial advisor is assigned to every account – a key differentiator for InvestPath clients – and these advisors are available to work with clients on financial planning and investment strategies to help reach their goals.

“Many people are interested in investing, but they may not feel confident in building their portfolio, or they are unsure of how to get started. InvestPath is a practical solution, both for the emerging investor as well as current investors, who want to balance the convenience of technology with the personalized guidance of a financial advisor,” said Jim Nonnengard, head of Regions Investment Services. “We often tell our clients that the time to begin planning your financial future is now – even if you are years away from retirement or major life events like sending a child to college, buying a new home, or other goals. InvestPath further enables our financial advisors to offer a seamless customer experience to support our clients’ financial goals at all stages of life.”

As a client sets up an InvestPath account, they select their risk preferences, timelines, personal goals, and more. InvestPath will recommend one of five established asset allocation models based on the client’s financial goals, risk tolerance, and investment preferences. Portfolios leverage low-cost Exchange Traded Funds (ETFs) to gain desired exposures and create diversification.

InvestPath’s digital platform gives clients 24/7 access to their investments with the ability to review positions, access statements, and understand their full financial picture. Clients can open and access their InvestPath account via Regions Online Banking or by connecting with a Regions Investment Solutions financial advisor.

“Convenience and customization are key drivers in the innovation of our new digital advisor solution,” said Bill Ritter, head of Regions Wealth Management. “InvestPath allows our Wealth Management team to continue providing a best-in-class experience based on individual clients’ preferences. This is another important way we are deepening relationships with current clients while also welcoming new clients who can benefit from diversified financial strategies and more options to help them reach their investment goals.”

To see InvestPath at work, a video overview is available at this link. Additional information on InvestPath is also available through this link on Regions.com.

Regions Investment Solutions offers comprehensive investment services at Regions Bank locations through a network of 250 financial advisors serving more than 1,200 Regions branches across the bank’s retail footprint in the South, Midwest, and Texas.

About Regions Financial Corporation

Regions Financial Corporation (NYSE:RF), with $164 billion in assets, is a member of the S&P 500 Index and is one of the nation’s largest full-service providers of consumer and commercial banking, wealth management, and mortgage products and services. Regions serves customers across the South, Midwest, and Texas, and through its subsidiary, Regions Bank, operates approximately 1,300 banking offices and more than 2,000 ATMs. Regions Bank is an Equal Housing Lender and Member FDIC. Additional information about Regions and its full line of products and services can be found at www.regions.com.

Regions Investment Solutions is a marketing name of Cetera Investment Services. Securities and insurance products are offered through Cetera Investment Services LLC (doing insurance business in CA as CFG STC Insurance Agency LLC), member FINRA/SIPC. Advisory services are offered through Cetera Investment Advisers LLC. Neither firm is affiliated with the financial institution where investment services are offered. InvestPath™ is a trademark of Cetera Investment Services, LLC. A diversified portfolio does not assure a profit or protect against loss in a declining market. Individuals affiliated with Cetera firms are either Registered Representatives who offer only brokerage services and receive transaction-based compensation (commissions), Investment Adviser Representatives who offer only investment advisory services and receive fees based on assets, or both Registered Representatives and Investment Adviser Representatives, who can offer both types of services.

Investment products are not FDIC insured, are not bank guaranteed, are not deposits, are not insured by any government entity, are not a condition of any banking activity, and may lose value.

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