NEWS RELEASE

OneDigital and Wintrust Investments, LLC Form Strategic Relationship for Retirement Plan Servicing Business

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Brings Over $2.6 Billion in Advisory Assets to the OneDigital Platform of Over $100 Billion

OVERLAND PARK, Kan. and CHICAGO, Feb. 15, 2024 (GLOBE NEWSWIRE) -- OneDigital Investment Advisors LLC, an SEC-registered investment adviser and wholly owned subsidiary of OneDigital, a leading insurance brokerage, financial services, and HR consulting firm (“OneDigital”), today announced it has entered into a strategic relationship with Wintrust Investments, LLC (“Wintrust”) whereby they will acquire Wintrust’s Retirement Benefits Advisors division based in Chicago. Wintrust is a subsidiary of Wintrust Financial Corporation (Nasdaq: WTFC).

Wintrust’s ongoing referral partnership with OneDigital will drive additional scale and increased capabilities to benefit their over 200 clients who sponsor workplace retirement savings plans. The Wintrust Retirement Benefits Advisors team, led by Dan Peluse, will continue to personally help their clients navigate the ever-changing retirement plan landscape with the specialized expertise and scale of OneDigital's national retirement plan advisory practice. They will join forces with OneDigital’s existing 35 teams, including group health insurance and property & casualty specialists, spread across their north central market to bring clients a broader set of resources to meet the unique needs of employers today.

Vincent Morris, President Retirement + Wealth, OneDigital, noted, “We are delighted that Wintrust Retirement Benefits Advisors has chosen to unite with OneDigital. The decision to align our strengths underscores a shared

commitment to providing holistic, customized retirement planning and solutions that elevate client outcomes. OneDigital's strong footprint in Chicago, coupled with Wintrust's esteemed reputation and Dan Peluse's proven leadership, positions us to further extend our influence in the region. I am so excited to have Dan and his team join the OneDigital family, and I look forward to continuing and enhancing the strong legacy of client service that both Wintrust and OneDigital are known for."

"We are excited to be partnering with OneDigital. This deal will enable us to increase the value we can create for our clients through better purchasing power with both plan administrators and investment management firms and an expanded service offering beyond fiduciary plan consulting," said **Tom Zidar, Chairman and CEO of Wintrust Wealth Management**.

The transaction brings advisory accounts with approximately $2.6 billion in retirement plan assets representing over 40,000 participants and 200 clients to OneDigital.

About OneDigital
OneDigital's team of fierce advocates helps businesses and individuals achieve their aspirations of health, success and financial security. Our insurance, financial services and HR platform provides personalized, tech-enabled solutions for a contemporary work-life experience. Nationally recognized for our culture of caring, OneDigital's teams enable employers and individuals to do their best work and live their best lives. More than 75,000 employers and millions of individuals rely on our teams for counsel and access to fully integrated worksite products and services and the retirement and wealth management advice provided through OneDigital Investment Advisors. Founded in 2000 and headquartered in Atlanta, OneDigital maintains offices in most major markets across the nation. To learn more, visit **onedigital.com**.

Investment advice offered through OneDigital Investment Advisors LLC, an SEC-registered investment adviser and wholly owned subsidiary of OneDigital.

About Wintrust Financial Corporation
Wintrust Financial Corporation is a financial holding company with assets of approximately $56 billion whose common stock is traded on the NASDAQ Global Select Market. Built on the "HAVE IT ALL" model, Wintrust offers sophisticated technology and resources of a large bank while focusing on providing service-based community banking to each and every customer. Wintrust operates fifteen community bank subsidiaries, with over 170 banking locations located in the greater Chicago and southern Wisconsin market areas. Additionally, Wintrust operates various non-bank business units including business units which provide commercial and life insurance premium financing in the United States, a premium finance company operating in Canada, a company providing short-term accounts receivable financing and value-added out-sourced administrative services to the temporary staffing services industry, a business unit engaging primarily in the origination and purchase of residential mortgages for

sale into the secondary market throughout the United States, and companies providing wealth management services and qualified intermediary services for tax-deferred exchanges. Visit **wintrust.com** for more information.

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Source: Wintrust Financial Corporation