



## Amerant Partners with Marstone to Offer Customer-Centric Digital Wealth Management Solutions

May 27, 2021

### **Simpler, smarter and easier online wealth management will help drive Amerant's ongoing growth of assets under management (AUM)**

CORAL GABLES, Fla., May 27, 2021 (GLOBE NEWSWIRE) -- [Amerant Bank](#), the second largest community bank headquartered in Florida, today announced its partnership with leading digital wealth management technology firm [Marstone, Inc.](#)

With this partnership, Marstone's platform will help empower Amerant customers to fully understand their financial position, plans and outlook, while benefiting from high-touch relationship management, which is expected to improve banking relationships further. Coupled with industry-leading technology, Amerant customers can trust their experience will be a truly proactive and personal one.

"At Amerant, our clients seek sophisticated, personalized and collaborative experiences that strengthen the trust between them, our Company and their relationship managers," said Jerry Plush, Vice Chairman & CEO of Amerant Bank. "Marstone's digital-first platform will enable us to build holistic relationships with our customers and efficiently provide them the online tools, quality service and customized programs they're seeking. In Marstone, we found a partner that also lives by a customer-first philosophy that we believe will enable us to meet the changing needs a customer may have along their financial journey."

"As the banking industry rapidly transformed due to the pandemic, we consistently heard that digital wealth solutions were essential to attract and retain clients – especially with an audience that desires meaningful relationships with their bank to ensure they get a panoramic view of all their opportunities for future growth," said Margaret J. Hartigan, Co-founder and CEO of Marstone. "Financial institutions need to be able to offer turnkey solutions to customers while simultaneously creating cost-efficiencies for themselves and Amerant was quick to see the benefits Marstone provides to both end-customers and our banking partners alike."

Amerant provides individuals and businesses in the U.S., as well as select international clients, with deposit, credit and wealth management services. As of Q1 2021, Amerant surpassed \$2 billion in AUM and believes that it will continue to grow AUM as a result of the continuation of the company's client-focused and relationship-centric strategy, which will now include its partnership with Marstone.

For more information about Amerant, visit [AmerantBank.com](#) and [Investor.AmerantBank.com](#), and follow the Company on [Facebook](#), [Twitter](#), [Instagram](#) and [LinkedIn](#) at @AmerantBank.

To learn more about Marstone's offerings, please visit [www.marstone.com](#) or contact us at [info@marstone.com](mailto:info@marstone.com).

### **Cautionary Notice Regarding Forward-Looking Statements**

This press release contains "forward-looking statements" within the meaning of the Securities Act of 1933 and the Securities Exchange Act of 1934, including statements with respect to our objectives, expectations and intentions regarding our partnership with Marstone and other statements that are not historical facts. All statements other than statements of historical fact are statements that could be forward-looking statements. You can identify these forward-looking statements through our use of words such as "may," "will," "anticipate," "assume," "should," "indicate," "would," "believe," "contemplate," "expect," "estimate," "continue," "plan," "point to," "project," "could," "intend," "target," "goals," "outlooks," "modeled," "dedicated," "create," and other similar words and expressions of the future.

Forward-looking statements, including those as to our beliefs, plans, objectives, goals, expectations, anticipations, estimates and intentions regarding our partnership with Marstone involve known and unknown risks, uncertainties and other factors, which may be beyond our control, and which may cause the Company's actual results, performance, achievements, or financial condition to be materially different from future results, performance, achievements, or financial condition expressed or implied by such forward-looking statements. You should not rely on any forward-looking statements as predictions of future events. You should not expect us to update any forward-looking statements, except as required by law. All written or oral forward-looking statements attributable to us are expressly qualified in their entirety by this cautionary notice, together with those risks and uncertainties described in "Risk factors" in our annual report on Form 10-K for the fiscal year ended December 31, 2020 and in our other filings with the U.S. Securities and Exchange Commission (the "SEC"), which are available at the SEC's website [www.sec.gov](#).

### **About Amerant**

Amerant Bancorp Inc. (NASDAQ: AMTB and AMTBB) is a bank holding company headquartered in Coral Gables, Florida since 1979. The Company operates through its subsidiaries, Amerant Bank, N.A. (the "Bank"), Amerant Investments, Inc., Elant Bank and Trust Ltd., and Amerant Mortgage, LLC. The Company provides individuals and businesses in the U.S., as well as select international clients, with deposit, credit, and wealth management services. The Bank, which has operated for over 40 years, is the second largest community bank headquartered in Florida. The Bank operates 25 banking centers – 18 in South Florida and 7 in the Houston, Texas area. For more information, visit [AmerantBank.com](#), [Investor.AmerantBank.com](#), and follow Amerant on [Facebook](#), [Twitter](#), [Instagram](#) and [LinkedIn](#) at @AmerantBank.

### **About Marstone**

Marstone is a leading digital wealth management platform with a mission to enhance financial literacy, deepen financial inclusion, and humanize finance for all. Its enterprise-ready solution, Powered by Marstone™, enables financial institutions to efficiently and affordably reach, acquire, and retain clients who seek straightforward information and engagement around their finances.

As a proven and trusted technology partner, Marstone has comprehensive integrations with custodians including Pershing, core banking platforms including Fiserv, account aggregation platforms, and investment managers. These integrations, in addition to Marstone's partnerships with globally recognized foundations including the World Economic Forum Centre for the Fourth Industrial Revolution and leadership participation in the Milken Institute's FinTech Advisory Committee, provide organizations the opportunity to deploy a technology that will help future-proof their businesses as consumer expectations for digital wealth management evolve.

**Media Contacts:**

Amerant: Israel Kreps  
[IKreps@KrepsPR.com](mailto:IKreps@KrepsPR.com)  
786-374-3434

Marstone: Kate Gundry  
[marstone@pluckpr.com](mailto:marstone@pluckpr.com)  
617-797-5174