

Etico Financial Secures \$10M Investment from Eos Ventures to Empower Modern Wealth Advisory

Funding will accelerate Etico's platform and position as best-in-class support for independent financial advisors

SARATOGA SPRINGS, NY, UNITED STATES, April 29, 2025

/EINPresswire.com/ -- [Etico](#), a modern wealth advisory platform specializing in bespoke support for independent financial advisors, closed a \$10 million funding round from [Eos Ventures](#), a leading global venture capital fund.



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Joe Leo, Chief Executive Officer of Etico

Eos’ investment will fund new technology development, marketing infrastructure, expanded advisor transition and back-office support—strengthening Etico’s mission to help investors and independent advisors through all stages of their financial life.

“New capital allows us to double down on what matters most—supporting remote, independent advisors who want to scale their businesses and deepen client relationships without being weighed down by operational burdens or the shifting agendas of aggregators,” said Joe Leo, Chief Executive Officer of Etico. “Our bespoke wealth management platform empowers legacy advisors to grow with confidence and transition their practices to the next

generation of professionals.”

Zach Powell, General Partner at Eos, will join the Etico Board of Directors. “From the moment we met the Etico team, we were impressed with their deep domain expertise, go-to-market approach, and commitment to providing unparalleled service to independent advisors,” said Zach Powell. “Etico offers a modern platform for the leading independent advisor to attract,

grow, and transition their practices.”
Eos is the first institutional investor.

Independent financial advisors are the fastest growing segment of wealth advisory, but few platforms are available that empower growth, support transition planning, and offer ‘right-fit’ solutions curated for each advisor’s needs. Etico advisors have better access to new clients, better serve their existing accounts, and better optimize internal effort on the highest-value operations while maintaining independence and flexibility.

With the Eos investment, Etico enters its next chapter of growth—delivering even greater value to advisors seeking independence, scale, and long-term success.



Joe Leo, CEO of Etico Financial

About Etico Financial

At Etico Financial, we empower independent financial advisors to own their journey and build scalable, thriving practices. Designed by advisors, for advisors, our solutions combine tailored back-office support, cutting-edge technology, and flexible investment strategies to streamline operations, enhance client experiences, and drive growth.

We specialize in seamless transitions, personalized service, and transparent compensation, enabling advisors to focus on their clients while scaling their business without compromise.

Etico isn’t just a partner—it’s a platform for your success. Learn more at: www.eticofinancial.com

About Eos Ventures

Eos Ventures is a global venture capital firm that identifies, invests in, and scales companies at the intersection of insurance, technology, and related sectors. The firm pairs deep insurance, investment, and operating experience with a thesis-driven approach to sectors including: insurance, cybersecurity, health, wealth, employee benefits and real estate. Learn more at eosvc.com

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