



Wealthfront Reports June 2026 Monthly Metrics

July 7, 2026

PALO ALTO, Calif., July 07, 2026 (GLOBE NEWSWIRE) -- Wealthfront Corporation (Nasdaq: WLTH) today reported select monthly metrics for June 2026.

"Total Platform Assets reached another month-end record at the end of June at \$99.1 billion due to Investment Advisory Net Deposits," said CEO David Fortunato. "These figures include continued strength in net cross-account transfers to and cross-product adoption of Investment Advisory accounts, driving asset-weighted cross-product adoption up to over 63% at June-end. We are encouraged by our recent, sustained success in driving higher asset-weighted cross-product adoption as well as the increased month-over-month growth in Funded Clients in June, highlighting the diversified and durable nature of our business model."

- **Total Platform Assets** at the end of June 2026 were \$99.1 billion, relatively flat since the end of May 2026 and an increase of 15% year-over-year.
 - **Cash Management Assets** at the end of June 2026 were \$44.8 billion, a decrease of 1% from the end of May 2026 and 2% year-over-year.
 - **Investment Advisory Assets** at the end of June 2026 were \$54.3 billion, an increase of 1% from the end of May 2026 and 33% year-over-year.
- **Total Net Deposits** in June 2026 were \$164 million. This consisted of **Cash Management Net Deposits** of -\$235 million and **Investment Advisory Net Deposits** of \$399 million.
- **Funded Clients** at the end of June 2026 were 1.49 million, an increase of 1% from the end of May 2026 and 15% year-over-year.

	Jun-26	May-26	Jun-25	MoM	YoY
Total Platform Assets (in \$ M)	\$99,095	\$98,961	\$86,483	0.1%	14.6%
Cash Management Assets	\$44,752	\$44,987	\$45,706	(0.5%)	(2.1%)
Investment Advisory Assets	\$54,343	\$53,974	\$40,777	0.7%	33.3%
Total Net Deposits (in \$ M)	\$164	\$447	\$1,004	NM	NM
Cash Management Net Deposits	(\$235)	\$104	\$771	NM	NM
Investment Advisory Net Deposits	\$399	\$342	\$234	NM	NM
Funded Clients (in K)	1,491	1,473	1,295	1.2%	15.1%

Note: Subtotals may not add up to totals due to rounding.

Disclosures

For definitions and additional information regarding these metrics, please refer to Wealthfront's full monthly metrics release, which is available on ir.wealthfront.com.

This monthly metrics report provides certain limited purpose monthly performance results of Wealthfront Corporation and its consolidated subsidiaries ("we," "Wealthfront" or the "Company"). This information is presented without commentary and should be read in conjunction with our most recent quarterly and annual results and our filings with the U.S. Securities and Exchange Commission (the "SEC"), which are available under the "Financial Information" tab of our Investor Relations website at ir.wealthfront.com.

The information provided is unaudited and the information for the months in the most recent fiscal quarter is preliminary, based on our estimates and subject to completion of our financial closing procedures. During the course of the financial close process, the Company may identify items that would require it to make adjustments, which may have a material impact to the information presented in this monthly metrics report, and final results for the fiscal quarter, as reported in our quarterly and annual filings with the SEC, may vary from the information provided herein. Past performance is not necessarily indicative of future results, and due to the limited nature of this data, a consistent correlation to earnings should not be assumed.

We intend to make these monthly metrics reports available on a regular basis on our Investor Relations website. We expect monthly metrics reports regarding each of the first two months of each fiscal quarter to be available towards the beginning of the following month. We expect the monthly metric report for the third month of each fiscal quarter to be made available alongside our quarterly earnings announced for that completed quarter.

In addition to filings we make with the SEC, we use our Investor Relations website (ir.wealthfront.com), our X account (@Wealthfront), and our LinkedIn page (linkedin.com/company/wealthfront) as means of disclosing material non-public information and for complying with our disclosure obligations under Regulation FD.

About Wealthfront

Wealthfront is a tech-driven financial platform helping digital natives turn their savings into wealth. Since pioneering the automated investing category in 2011, the company has grown into a leading consumer fintech that helps clients achieve their financial goals with innovative saving, investing, borrowing, and lending products. Wealthfront's expanding suite of high-quality, low-cost offerings helps digital natives earn more on their savings, borrow at lower rates, and keep more of their returns. To learn more and get started, visit www.wealthfront.com or download the Wealthfront app.

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