

Hearts & Wallets Hires John Towle as Chief Client Officer New Position Supports Growing Client Base for Advice Benchmarking, Market Research and Interactive Software

(March 11, 2021, Rye, NY) – [Hearts & Wallets LLC](#), the financial services research and benchmarking firm, is pleased to announce the appointment of John Towle as Chief Client Officer to support the firm’s growing client base and demand for its advice benchmarking, thought leadership reports and interactive software.

The new role brings together client services, business development and marketing into a single function, strengthening Hearts & Wallets’ position as a client-centric, market leader with the experience and expertise to help clients achieve their growth and other business objectives.

“John’s experience and industry knowledge will help our clients grow their business,” Laura Varas, chief executive officer and founder of Heart & Wallets, said. “He understands client needs and investing businesses and will work in partnership with our clients to help them transition to today’s consumer-centric competitive landscape.”

In his new role, Towle will focus on client service, client engagement and new business development with the goal of building stronger relations with existing clients and developing relations and business opportunities with new clients.

“I am delighted to join this rapidly growing company and help our clients to better understand how consumers save, invest and seek advice,” Towle said. “I’m particularly excited about teaching more users to harness the power of our interactive software for immediate answers and helping more firms access the benefits of advice benchmarking. Our scalable platform makes it even easier for smaller and mid-size asset management and advisory firms and savings institutions to access what was previously only available to traditional, larger asset managers.”

Towle brings over 30 years of experience in financial services to his role at Hearts & Wallets, with a focus on product marketing, marketing communications and distribution marketing. For the past 15 years, Towle spent his career in senior marketing and chief marketing officer roles for a number of alternative investment firms, including Cantor Fitzgerald, Cole Real Estate Investments and FS Investments. He launched numerous public and private real estate and debt funds, and the industry’s first retail private security interval fund, raising billions in investor capital through the independent advisor and RIA markets.

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Prior to that, Towle led marketing for ING's (Voya) mutual fund business and oversaw the marketing and distribution support for over 40 funds with approximately \$60 billion in assets under management. Earlier, Towle spent 11 years in retail at Fidelity Investments, marketing a full range of products to the mass affluent and high-net-worth segments.

Towle holds a bachelor of arts in English from the University of Colorado and a master's in business administration from Babson's Olin School of Business Management. He resides in Villanova, PA, with his family.

About Hearts & Wallets

Hearts & Wallets is the research and benchmarking firm that specializes in how consumers save, invest and seek financial advice. Leading firms use Hearts & Wallets thought-leadership reports, software and benchmarking to make their saving, investing and advice solutions more consumer-centric. For more information visit www.heartsandwallets.com.

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