

Savvy Wealth Raises \$100 Million Series C

Client News

September 9, 2026

Gunderson Dettmer represented Savvy Wealth in its \$100 million Series C financing led by Halo Fund. The oversubscribed round included participation from existing investors including Thrive Capital, Industry Ventures/Goldman Sachs, Canvas Prime, Index Ventures, House Fund, Euclidean Capital, Alumni Ventures, and Vestigo Ventures.

Savvy is an AI-native, multi-custodial registered investment adviser built for independent financial advisors, combining modern technology with world-class support to make independence simple and scalable. The new capital, which brings Savvy's total funding to more than \$200 million, will be used to expand Savvy Intelligence, build out the services advisors need to better serve their clients, and hire top technical talent to continue developing the platform.

"Advisors are being told they have to give up their independence to scale," said Ritik Malhotra, founder and CEO of Savvy Wealth, [in the announcement of the transaction](#). "We think that's a false tradeoff, and we've spent the last five years proving it."

The Gunderson deal team was led by Colman Lynch and Sam Feldman and included Sam Nyitray and Lawrence Ho.

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