



# NEWS RELEASE

## Ivy Distributors, Inc.

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## Ivy Funds now goes to market as Ivy Investments, acknowledging product, geographic expansion

OVERLAND PARK, KS, April 22, 2016 – Reflecting progressive product offerings and a growing global presence, Ivy has modernized its brand moniker and imagery. Effective April 22, 2016, Ivy Funds goes to market under the Ivy Investments banner and continues its “The World Covered” tagline.

The name of the distribution entity, previously Ivy Funds Distributor, Inc., has changed to Ivy Distributors, Inc.

“The single brand umbrella ‘Ivy Investments’ reflects the steps taken over several years to broaden Ivy’s product line beyond U.S. retail mutual funds, reaching new clients and addressing the evolving needs of existing clients,” said Thomas W. Butch, president and CEO of Ivy Distributors, Inc. “We are also bringing wholesale, institutional and offshore distribution under a consistent brand.”

The brand changes will be implemented across the remainder of 2016, including web properties, marketing collateral and signage. Ivy’s website will convert to [www.ivyinvestments.com](http://www.ivyinvestments.com) at 3 p.m. central time April 22, 2016, with content continuously updated in the coming weeks.

“We’ve taken several progressive and strategic steps to magnify our distinction, including our recent filing related to exchange traded managed funds, while offering our competitive investment management skills to a wider audience internationally through Ivy Global Investors,” said Hank Herrmann, CEO of Waddell & Reed Financial, Inc. (NYSE:WDR), Ivy’s parent firm. “We will continue to distinguish our brand by emphasizing our global research and market coverage.”

Both the broadening product suite and a growing presence geographically opened the door to a detailed study of Ivy’s brand and market presence, leading to the new brand positioning, according to Butch. A stylized Ivy leaf and updated graphic presentation, from logo to identity programs across digital and print properties, is the result.

### **About Ivy Investments**

Ivy Investments<sup>SM</sup> is a global organization recognized for inventive, actively-managed investing strategies that help investors best meet their long-term goals. Our roots date to 1937 and, over the years, we’ve built our time-tested investment process within an authentic and demanding culture –



one that values preparedness, collaboration and accountability. These values extend from our broad internal investing capability, which reaches all major asset classes, to our subadvisor partners, to the distribution team that supports advisors and our clients.

Ivy Investment Management Company and Ivy Distributors, Inc. are affiliates of Waddell & Reed Financial, Inc. Through its subsidiaries, Waddell & Reed Financial, Inc. provides investment management and financial planning services to clients throughout the U.S. The firm had approximately \$104 billion in total assets under management at Dec. 31, 2015.

IVY INVESTMENTS<sup>SM</sup> refers to the financial products and services offered by Ivy Distributors, Inc., a FINRA member broker dealer and the distributor of IVY FUNDS<sup>®</sup> mutual funds, and those financial products and services offered by its affiliates, including Ivy Investment Management Company, an SEC registered investment advisor. IVY INVESTMENTS<sup>SM</sup> may also refer to Ivy Global Investors Funds, a range of sub-funds of Ivy Global Investors Fund SICAV, an umbrella UCITS fund domiciled in Luxembourg. Ivy Global Investors Funds are distributed globally by Ivy Investment Management Company and are available only to non-U.S. investors.

**Before investing, investors should consider carefully the investment objectives, risks, charges and expenses of a mutual fund. This and other important information is contained in the prospectus and summary prospectus, which may be obtained at [www.ivyinvestments.com](http://www.ivyinvestments.com) or from a financial advisor. Read it carefully before investing.**

Past performance is not a guarantee of future results. Investment return and principal value will fluctuate, and it is possible to lose money by investing.

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