

Note: This document is a translation of a part of the original Japanese version and provided for reference purposes only. In the event of any discrepancy between the Japanese original and this English translation, the Japanese original shall prevail.

October 25, 2021

To whom it may concern:

Company Name: WealthNavi Inc.
Representative: Kazuhisa Shibayama, Representative
Director and CEO
(Code Number: 7342 Tokyo Stock Exchange Mothers)
Inquiries: Gaku Hirose, Director, CFO
(TEL. 03-6632-4911)

WealthNavi and TAIKO BANK started offering “TAIKO Navi”

WealthNavi Inc. is pleased to announce that WealthNavi Inc. and THE TAIKO BANK, LTD. (Head office: Nagaoka-shi, Niigata, President: Yukio Ishida) started offering “TAIKO Navi,” a managed account service with a hybrid of online and face-to-face support on October 25, 2021. Please refer to the attached for details.

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Announcement regarding the launch of “TAIKO Navi”

THE TAIKO BANK, Ltd. (Head office: Nagaoka-shi, Niigata, President: Yukio Ishida; hereinafter, “TAIKO BANK”) and WealthNavi Inc. (Head office: Shibuya-ku, Tokyo; Representative Director and CEO: Kazuhisa Shibayama; hereinafter, “WealthNavi”) started offering “TAIKO Navi,” a managed account service with a hybrid of online and face-to-face support on October 25, 2021.



1. Outline of “TAIKO Navi”

“TAIKO Navi” is a managed account service with a hybrid of online and face-to-face support for customers of TAIKO BANK. Through this new service, WealthNavi provides its world-class wealth management algorithm and platform, and bank staff at TAIKO BANK supports customers face-to-face to start and continue long-term investment with a globally diversified portfolio.

TAIKO BANK and WealthNavi will continue to enhance services in order to satisfy various needs of our local customers.

Service URL: <https://www.taikobank.jp/deposit/taiko-navi/>

Please refer to the TAIKO BANK’s homepage above for service description and disclaimers of “TAIKO Navi” as well as for opening an account.

[Risks and expenses relating to transactions in financial instruments through “TAIKO Navi”]

There is risk of incurring a loss because of fluctuations in the interest rate, the value of currencies, quotations on the financial instruments market, and other indicators, as well as the risk of invested principal falling below par in relation to transactions in financial instruments provided by “TAIKO Navi.”

When using “TAIKO Navi,” please carefully read the pre-contract documents prior to executing the agreement.

Risks and expenses relating to transactions in financial instruments
(<https://www.wealthnavi.com/policy/rule/01-hybrid>).

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2. Company Overview

■THE TAIKO BANK, Ltd.

Name: THE TAIKO BANK, Ltd.
Representative: Yukio Ishida, President
Established: March 1942
Location: 1-5-6, Otedori, Nagaoka-shi, Niigata, Japan
Capital: 10 billion yen as of March 31, 2021
URL: <https://www.taikobank.jp>
Business activities: Banking
Financial institution registered with the Kanto Local Finance Bureau
(registration No. 61)
Memberships: Japan Securities Dealers Association

■WealthNavi Inc.

Name: WealthNavi Inc.
Representative: Kazuhisa Shibayama, Representative Director and CEO
Established: April 28, 2015
Location: 9F. Shibuya Higashiguchi Bldg., 2-22-3 Shibuya, Shibuya-ku, Tokyo 150-0002 Japan
Capital: 1,761,471,125 yen as of January 20, 2021
URL: <https://corp.wealthnavi.com/>
Business activities: Financial Instruments Firm registered with the Kanto Local Finance Bureau
(registration No. 2884)
Memberships: Japan Securities Dealers Association
Japan Investment Advisers Association
Japan Payment Service Association