

**UNITED STATES  
SECURITIES AND EXCHANGE COMMISSION**

Washington, D.C. 20549

**FORM 8-K**

**CURRENT REPORT  
Pursuant to Section 13 or 15(d)  
of the Securities Exchange Act of 1934**

Date of Report (Date of earliest event reported): **July 31, 2025**

**MarketWise, Inc.**

(Exact name of registrant as specified in its charter)

**Delaware**

(State or other jurisdiction of incorporation)

**001-39405**

(Commission File Number)

**87-1767914**

(I.R.S. Employer Identification No.)

**1125 N. Charles St.  
Baltimore, Maryland 21201**

(Address of principal executive offices, including zip code)

**(888) 261-2693**

(Registrant's telephone number, including area code)

**N/A**

(Former name or former address, if changed since last report)

Check the appropriate box below if the Form 8-K is intended to simultaneously satisfy the filing obligation of the registrant under any of the following provisions:

- Written communications pursuant to Rule 425 under the Securities Act  
 Soliciting material pursuant to Rule 14a-12 under the Exchange Act  
 Pre-commencement communications pursuant to Rule 14d-2(b) under the Exchange Act  
 Pre-commencement communications pursuant to Rule 13e-4(c) under the Exchange Act

**Securities registered pursuant to Section 12(b) of the Act:**

<b>Title of each class</b>	<b>Trading Symbol(s)</b>	<b>Name of each exchange on which registered</b>
<b>Class A common stock, \$0.0001 par value per share</b>	<b>MKTW</b>	<b>The Nasdaq Stock Market LLC</b>

Indicate by check mark whether the registrant is an emerging growth company as defined in Rule 405 of the Securities Act of 1933 (§230.405 of this chapter) or Rule 12b-2 of the Securities Exchange Act of 1934 (§240.12b-2 of this chapter).

Emerging growth company

If an emerging growth company, indicate by check mark if the registrant has elected not to use the extended transition period for complying with any new or revised financial accounting standards provided pursuant to Section 13(a) of the Exchange Act.

**Item 5.02. Departure of Directors or Certain Officers; Election of Directors; Appointment of Certain Officers; Compensatory Arrangements of Certain Officers.**

*Appointment of Chief Operating and Financial Officer*

On July 31, 2025, the Board of Directors (the “Board”) of MarketWise, Inc. (the “Company”) appointed Erik Mickels, current Chief Financial Officer of the Company, to the role of Chief Operating Officer, effective as of July 31, 2025. Mr. Mickels will remain Chief Financial Officer, in addition to his new position as Chief Operating Officer of the Company, becoming the Company’s Chief Operating and Financial Officer. There have been no changes to Mr. Mickel’s compensation in connection with his appointment as Chief Operating and Financial Officer of the Company.

Mr. Mickels, age 49, has served as the Company’s Chief Financial Officer since August 2023. Mr. Mickels joined the Company from Trilogy International Partners, Inc., a publicly traded telecommunications company, where he held various roles of increasing responsibility from 2014 to 2023; from 2016 to 2023, Mr. Mickels served as Group Chief Financial Officer and Senior Vice President; from 2015 to 2016, Mr. Mickels served as Vice President of Finance and Chief Accounting Officer; and from 2014 to 2015, Mr. Mickels served as Vice President and Corporate Controller. From 2000 to 2014, Mr. Mickels served in senior positions at KPMG LLP. Mr. Mickels holds a B.S in Accounting from Hillsdale College, is a graduate of the Advanced Management Program at Harvard Business School and is a Certified Public Accountant.

There is no arrangement or understanding between Mr. Mickels and any other persons pursuant to which Mr. Mickels was appointed to his position. There are no family relationships between Mr. Mickels and any of the Company’s officers or directors. There are no transactions in which Mr. Mickels has an interest requiring disclosure under Item 404(a) of Regulation S-K.

On August 6, 2025, the Company issued a press release announcing Mr. Mickels’ appointment as Chief Operating and Financial Officer, which is attached hereto as Exhibit 99.1.

**Item 9.01. Financial Statements and Exhibits.**

(d) Exhibits.

<u>Exhibit No.</u>	<u>Description</u>
99.1	<a href="#">MarketWise, Inc. press release, dated August 6, 2025</a>
104	Cover Page Interactive Data File (embedded within the Inline XBRL document)

**SIGNATURE**

Pursuant to the requirements of the Securities Exchange Act of 1934, the registrant has duly caused this report to be signed on its behalf by the undersigned hereunto duly authorized.

**MarketWise, Inc.**

Date: August 6, 2025

By: /s/ Scott Forney

Name: Scott Forney

Title: General Counsel

## **MarketWise Appoints Erik Mickels as Chief Operating and Financial Officer**

BALTIMORE, -- MarketWise, Inc. (NASDAQ: MKTW) MarketWise, a leading platform for empowering and educating investors, today announced the appointment of **Erik Mickels as Chief Operating and Financial Officer**, effective immediately.

In this newly combined leadership role, Mickels will drive the company's operational excellence, financial strategy, and enterprise transformation as MarketWise advances its mission to deliver world-class financial insights to self-directed investors.

Mickels brings more than 25 years of experience serving a broad range of organizations from startups to Fortune 500 market leaders and has played a pivotal role in the strategic transformation of businesses, including supporting cooperation across segments. He's guided acquisitions and led successful initiatives, including the sale of a billion-dollar international subsidiary. His leadership has delivered improvement in performance, cost discipline, and value for past shareholders.

"Erik is an enthusiastic leader with the wonderful ability to apply strategic finance, encourage operational rigor, and understand the benefits of our industry for individual investors." MarketWise CEO Dr. David Eifrig said. "He shares my passion for delivering value for our customers. His experience transforming complex organizations and driving sustainable growth makes him the ideal person for this expanded role. I am thrilled to have him as our Chief Operating and Financial Officer."

Mickels commented, "I am incredibly honored to step into this role and work alongside our talented leaders at such a pivotal time for MarketWise. As more individuals seek to take control of their financial future, the need for trusted, independent insights has never been greater. I'm excited to partner with our teams across the organization to build on MarketWise's strong foundation and support the next chapter of growth, innovation, and operational excellence."

A graduate of Hillsdale College and the Advanced Management Program at Harvard Business School, Mickels has proven himself to be a collaborative and innovative executive.

### **About MarketWise**

Founded with a mission to level the playing field for self-directed investors, today MarketWise is a leading multi-brand subscription services platform providing premium financial research, software, education, and tools for investors.

With more than 25 years of operating history, MarketWise serves a community of millions of free and paid subscribers. MarketWise's products are a trusted source for high-value financial research, education, actionable investment ideas, and investment software. MarketWise is a 100% digital, direct-to-customer company offering its research across a variety of platforms including mobile, desktops, and tablets. MarketWise has a proven, agile, and scalable platform and our vision is to become the leading financial solutions platform for self-directed investors.

### **MarketWise Investor Relations Contact**

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