Challenges

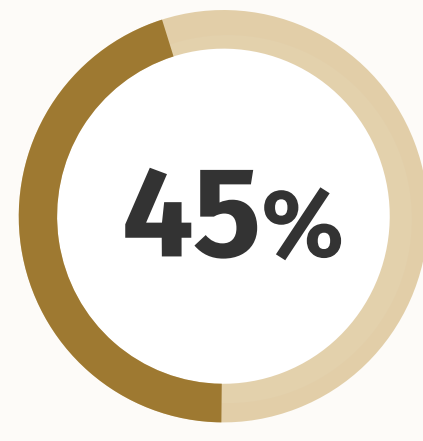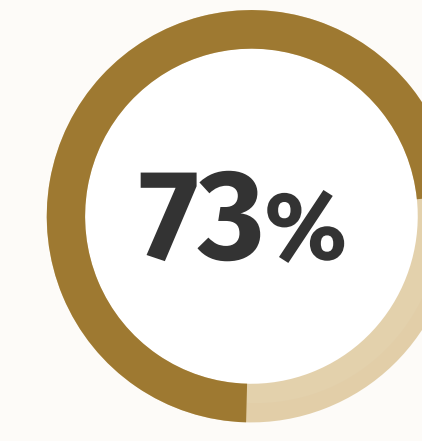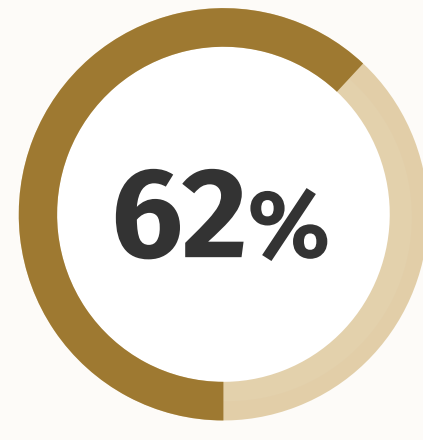**45%** of **wealth advisors** report that **administrative tasks** take up more than **30% of their workday**, leaving them with less time for client-facing activities.
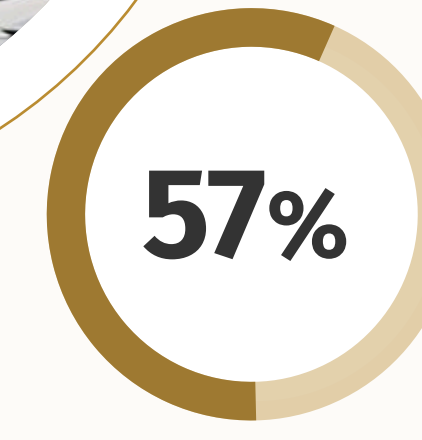
Cerulli

73% of **wealth managers** are using **at least five** different platforms to manage client accounts and tasks, which leads to significant inefficiencies and risk of data inconsistency.

PwC

62% of **advisors** say that managing **large data sets** is one of the most challenging aspects of their daily work.

T3 Technology Hub

57% of **advisors** report that **user interface complexity** reduces their productivity, causing them to spend significant time navigating systems rather than focusing on relationships.

J.D. Power

Impact

Wealth management firms that use AI for portfolio management and customer service report a 40% increase in advisor productivity.

J.D. Power

65% of wealth managers have adopted automation for back-office functions, resulting in a 20% increase in operational efficiency and reduced overhead costs.

Deloitte

57% of advisors report that using digital tools has helped them increase their client-facing time by up to 30%, leading to better service and stronger relationships.
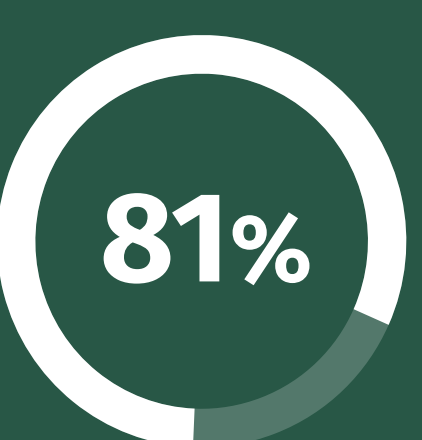
Cerulli

45% of wealth management firms report achieving cost reductions of 15-20% due to the implementation of digital tools and automation.
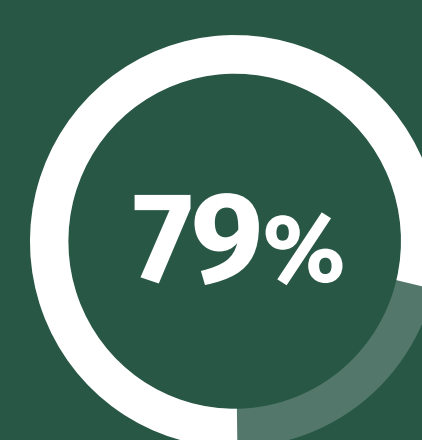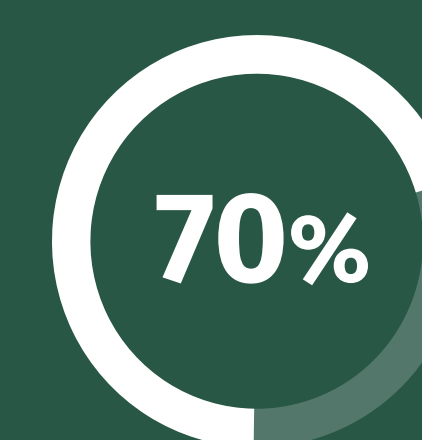
Capgemini

Future

81% of wealth managers plan to increase their use of AI and automation over the next 2–3 years to boost productivity and improve client experiences.
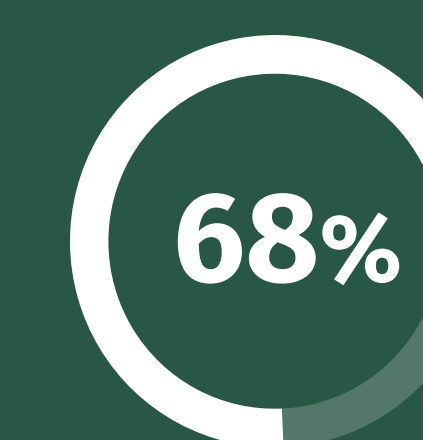
Forrester

79% of wealth managers expect to see increased demand for digital client engagement platforms, with 70% of their clients preferring to interact via mobile apps.

Accenture

70% of wealth managers intend to migrate their advisory platforms to the cloud in the next 3 years, driven by the need for better data integration and security.

Capgemini

68% of wealth managers plan to use data analytics to offer more personalized services, enabling them to tailor investment strategies based on predictive insights.

PwC

AI-Powered Client Insights

Administrative Tasks Automation

AI-Powered Predictive Analytics

Robo-Advisory Services

ESG Investing

Unification with CRMs

Personalized Client Experience Tools

Generative AI

Comprehensive Financial Planning Capabilities

Project Management and Collaboration Tools

Advanced Market Research and Analysis Tools