



NEWS FROM THE MOTIVE PARTNERS NETWORK

InvestCloud delivers the first of a new generation of AI-enabled solutions to drive advisor productivity and enhanced client engagement

Intelligent Solutions demonstrate company's commitment to creating a smarter financial future for wealth management

Partnerships with leading AI technology firms smartKYC and Zocks accelerate smarter client onboarding, proactive risk insights and personalized advisor-client collaboration

Los Angeles, CA, August 6, 2025 – InvestCloud, a global leader in wealth technology, today announced the first of a new generation of AI-enabled solutions to help advisors increase productivity and deliver greater value to clients. The new solutions, Intelligent Screening and Intelligent Meeting, are enhanced by technologies from smartKYC, the leading provider of AI-driven know your customer (KYC) risk screening and monitoring solutions, and Zocks, a privacy-first AI assistant for financial advisors.

[Intelligent Screening](#) from InvestCloud automates in-depth due diligence during client onboarding and performs ongoing risk monitoring. It enables private banks and wealth managers to perform faster, more accurate and cost-effective due diligence across every stage of the client relationship, freeing advisors, relationship managers and compliance officers to focus on decision-making rather than manual research.

[Intelligent Meeting](#) from InvestCloud transforms the way advisors prepare for, track and follow-through on discussions with clients. Meeting preparation, note-taking, action-item tracking and post-meeting workflows are automated and infused with intelligence from disparate systems to enable advisors to focus on meaningful client interactions and reduce time-consuming administrative and manual tasks.



“With this new generation of wealth solutions, starting with Intelligent Screening and Intelligent Meeting, we’re leveraging data and AI in new ways to address the disjointed systems and fragmented data challenges that are precluding optimal outcomes for advisors and their clients,” said **Dan Bjerke, President, Digital Wealth at InvestCloud**. “smartKYC and Zocks share our commitment to creating a smarter financial future, and with them we are enabling advisors to work smarter across the full client lifecycle and to foster deeper more productive relationships.”

To power this new generation of intelligent solutions, InvestCloud is connecting the wealth management ecosystem into a unified wealth data model that drives AI-enabled workflows, insights and experiences. The solutions will enable best-in-class advisor productivity and client engagement while upholding the highest standards of data privacy and efficiency.

“We’re proud to be collaborating on this transformational technology that will deliver immense value for advisors and their clients,” said **Mark Gilbert, Founder and CEO of Zocks**. “Intelligent Meeting from InvestCloud will not only make meetings more efficient; it will make them more meaningful by equipping advisors with a clearer, more actionable understanding of each client.”

Dermot Corrigan, CEO of smartKYC said, “The integration of smartKYC directly into Intelligent Screening from InvestCloud is designed to deliver a seamless onboarding experience for institutions that serve high-net-worth clients with complex structures, cross-border exposures and elevated risk profiles. This purpose-built solution reflects our shared commitment to innovation and client excellence.”

In late 2024, InvestCloud introduced a new strategic direction, setting its sights on creating a smarter future for wealth management. The Company also renewed its commitment to client excellence, integration and innovation.

Both solutions are available now to new and existing clients globally, and Intelligent Screening has already been recognized for excellence by WealthBriefingAsia.

About InvestCloud

InvestCloud, a global leader in wealth technology, aspires to enable a smarter financial future. Driving the digital transformation of the wealth management industry, the company serves a broad array of clients globally, including Wealth and Asset Managers, Wirehouses, Banks, RIAs, and Insurers. In terms of scale, the company’s clients represent more than 40 percent of the \$132 trillion of total assets globally. As a leader in delivering personalization and scale across advisory programs, including unified managed accounts (UMA) and separately managed accounts (SMA), the company is



committed to the success of its clients. By equipping and enabling advisers and their clients with connected technology, enhanced intelligence, and inspired experiences, InvestCloud delivers leading digital wealth management and financial planning solutions, complemented by a dynamic data warehouse, which scale across the complete wealth continuum. In 2024, InvestCloud introduced the first-of-its-kind Private Markets Account™ and Private Markets Account Network to enable integrated management of public and private markets assets from a single, unified managed account. InvestCloud was also named a CNBC World's Top Fintech Company in 2024, a proof point of the company's commitment to innovation and client success. Headquartered in the United States, InvestCloud serves clients around the world.

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About smartKYC

smartKYC is the leading provider of AI-driven KYC risk screening & monitoring solutions, serving financial institutions and multinational corporations worldwide. By combining artificial intelligence, linguistic and cultural sensitivity, and deep domain knowledge, smartKYC sets new standards for KYC quality, transforms productivity, and ensures compliance conformance.

[smartKYC | About us](#)

About Zocks

Zocks is the AI assistant for financial advisors. The company's platform saves advisors 10 hours a week by automating their meeting notes, intake forms, client emails & more. This enterprise-ready solution transforms client conversations into structured, actionable intelligence for firms of any size. To learn more and start a free trial, visit zocks.io.

[AI Meeting Assistant for Financial Advisors | Zocks](#)

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