FNZ Launches Advisor AI to Redefine Advisor Productivity and Scale Personalized Advice

FNZ launches Advisor AI, a next-generation artificial intelligence solution that enables advisors to work more efficiently, engage clients more effectively, and rapidly scale the delivery of personalized advice.

Embedded directly into FNZ's market leading wealth platform, Advisor AI improves advisor productivity, enhances the client experience and reduces administrative burden.

Advisor AI is the first in a series of new AI-driven solutions FNZ will launch to further boost advisor productivity and client engagement.

The launch follows the recently announced strategic partnership with Microsoft, which further enhances FNZ's global platform with advanced AI, automation and cloud capabilities.

London and New York, August 19, 2025 – FNZ, the global wealth management platform, has today announced the global launch of FNZ Advisor AI, a generative AI solution embedded directly into FNZ's market leading wealth management platform. The solution will help financial advisors enhance productivity, deliver more personalized advice and serve more clients at scale.

The modern advisor's context

Today's financial advisors face growing pressure to meet evolving client expectations, regulatory obligations and business growth targets, all while managing rising operational complexity.

Recent FNZ research found that 73% of wealth management clients expect more personalized services from their advisor in the next two years, while 70% of advisors believe better technology is essential to meeting those expectations.

FNZ Advisor AI addresses these challenges by integrating intelligent automation and AI-driven efficiencies directly into FNZ's market leading platform, placing powerful capabilities right at an advisor's fingertips.

Why FNZ Advisor AI will change the game

With more than 650 financial institution partners, over 26 million end investors and close to $2 trillion in assets on platform, FNZ provides access to one of the largest wealth management data sets in the world.

This enables FNZ Advisor AI to support smarter, faster decision-making by generating real-time insights based on client and portfolio data. Advisors can proactively identify opportunities, flag risks and tailor their recommendations across their full book of business, ultimately driving better client outcomes.

Advisor AI also automates the entire client meeting lifecycle. Advisors can now prepare for meetings using personalized insights, access relevant content during client meetings, and use Advisor AI to transcribe and analyze the discussions afterwards. The advanced solution will also highlight key points that require follow-up and guide advisors on the most relevant next conversations to have with each client.

The time spent on repetitive administrative tasks is significantly reduced, freeing up advisors to spend more time with clients and focus on delivering high-quality, personalized advice.

Security at its core

The technology is underpinned by a dedicated AI architecture, FNZ's robust AI governance framework, and close alignment with regulators to ensure the solution meets the highest industry standards while maintaining trust and security. This is supported by an experienced team running continuous evaluations, testing prompts and outputs to verify performance.

Alongside the advanced capabilities that set Adviser AI apart from generic solutions, robust guardrails are also built in to minimize the risk of AI hallucinations and ensure accuracy.

> **Roman Regelman, FNZ Group President**, said: "We know advisors globally are already experimenting with and relying on generative AI tools, but they are looking for integrated solutions to effectively and safely support them and their clients."
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> "FNZ Advisor AI changes the game. Underpinned by rigorous testing, and embedded into our market leading advisor platform, it enables advisors to spend more time with clients and deliver more reliable, faster and more personalized advice at scale. We are already seeing strong interest across our global client base and look forward to full deployment later this year."

This launch also follows the recent announcement of a global strategic partnership between FNZ and Microsoft, aimed at accelerating digital transformation in the wealth management industry and enhancing FNZ's AI, automation and cloud capabilities worldwide.