

# Trust, Transparency, and Scale in Modern Wealth Management



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I'm Suvrat Bansal, founder and CEO of Clarista. I've built my career around driving business outcomes with data and AI, while keeping governance and controls front and center. I've led large-scale data, analytics, and AI programs at global financial institutions, where you have to move fast and still prove accuracy, security, and accountability.

I started Clarista to make those institutional-grade capabilities available to every wealth manager, without the massive upfront cost, long timelines, or heavy infrastructure that usually comes with it. Clarista connects to the data and documents firms already have and creates a unified view, without copying or duplicating sensitive data.

The key for us is trust. We build in quality checks, traceability, and governed access so AI outputs are not just helpful, they are defensible. The goal is to help advisors and client teams serve more households in a more personal way, with more context and far less manual effort.

## Can you share a story that best illustrates your team's commitment to client service or problem solving?

A good example is our work with Leerink Partners. They were rolling out a new SaaS CRM on a hard deadline, and it depended on near real-time sync with a legacy system that held the system-of-record view of client trading and financial activity. The CEO's message was simple: hit the deadline, and do not disrupt client coverage.

We treated it like a mission-critical delivery. Our team worked around the clock to build the sync, but we also put the right controls under it. We stood up a cloud data foundation that centralized feeds from both systems, validated the data, and ensured what was flowing into the CRM was correct and consistent.

So, the outcome wasn't just "we made the deadline", in less than 4 months. They also ended up with a governed, unified data environment that improved ongoing data quality, reduced operational friction, and made analytics much easier to deliver going forward.

## Where do you draw inspiration for innovation, within the wealth industry or beyond it?

A lot of it is personal. I watched my parents work relentlessly with limited access to quality guidance, and I still see friends and extended family making major financial decisions, saving, investing, education, retirement, without advice that feels clear, personalized, and cost-effective. It reminds me that wealth management is deeply human, and service matters as much as performance.

Professionally, I draw from regulated environments where mistakes are expensive. I've seen what happens when controls are treated as an afterthought, and the cost of remediation can be enormous. That experience taught me that innovation only scales when it is reliable, traceable, and disciplined.

So, the combination we aim for is simple: consumer-grade simplicity in how teams use the product, and institutional-grade trust in the outputs. That's the standard we're building toward wealth AI.

