Search Chain Wealthtech Top 50

searchchainpartners.com

George Fierstone
Founder & CEO

Oliver Davis
Senior Consultant, WealthTech

Introduction

Founded by George Fierstone, Search Chain Partners is a specialist FinTech search firm, providing high-calibre sales/GTM, product, technology and professional services talent to some of the most influential firms backed by the industry's leading investors.

Our WealthTech practice places sales, client engagement, product, AI, technology, implementation and strategy & operations talent into the firms building the next generation of wealth management technology. This spans AI-powered adviser tools, portfolio management platforms, client engagement solutions, family office technology, data aggregation, reporting, compliance and investment infrastructure.

Led by George and Oliver, we partner with WealthTech firms from Seed through to Series D across the UK, Europe and North America, helping them build the teams that turn product-market fit into market leadership.

Producing the list

In speaking with top performers across WealthTech, wealth management and financial services, we consistently see how focused they are on delivering in their current roles, often with limited time to stay close to the broader market. This list is designed to bridge that gap.

It brings together firms shaping the future of wealth management technology, assessed across factors including the calibre of leadership and talent, strength of investors and boards, market traction, product innovation, and the scale of opportunity ahead.

Insights were gathered through ongoing conversations with our network of investors, founders, operators and technology leaders across commercial, product, operations and technology functions, spanning the UK, Europe, North America and APAC.

While we don't work with every company featured, it felt important to highlight the businesses driving meaningful change across wealth management, private banking, family offices, adviser technology and investment infrastructure. The aim is to provide a consultative view of the market at scale, while shining a light on some truly exceptional companies.

01

additiv

Additiv provides a cloud-native wealth management platform that enables banks, wealth managers and insurers to launch and scale digital investment and advisory services. Its API-first technology supports client onboarding, portfolio management, financial planning and embedded wealth solutions, helping financial institutions modernise legacy infrastructure and deliver personalised client experiences at scale.

People: 201-500

Locations: Germany, Dubai, London, Singapore, Switzerland

We are proud that additiv has been named among the 'Top 50 Firms to Work for in Wealthtech.' What sets us apart is a culture that combines innovation, collaboration, and purpose, empowering our team to thrive while driving transformation across the Financial Services industry. At additiv, we are committed to fostering an environment where people are valued, learning and growth encouraged, and our shared ambition is to shape the future of Financial Services."

Adrian Weiss, Head of Corporate Services

02

advisoryai

AdvisoryAI is the frontier AI for UK-regulated financial advice firms. Its conversational interface, Atlas, lets everyone in a practice, from advisers and paraplanners to compliance and operations staff, work in plain English: turning client meetings, fact-finds and documents into compliant, firm-specific suitability reports and compliance checks, each one backed by citations and an audit trail. More than 400 firms and 2,500 users run on the platform, which cuts admin time by 50 to 85% and hands advisers back the hours that matter for clients.

People: 11-50

Locations: London

The real race in our industry isn't faster AI, it's context. Every model turns up each morning like a brilliant adviser with amnesia, until you give it your firm's history to work from. Atlas is our answer: one interface that holds a firm's entire context and gets sharper the more the team uses it, so the whole practice compounds instead of starting from scratch every day. Building that attracts people who want to do the best work of their careers at the frontier of what AI can do for a real profession. We run on one rule, fail fast: better to learn something doesn't work in a week than a year. And everyone here would rather help advisers reach more clients than ship something safe."

Alan Gurung, Co-founder & CEO

03

aisot

Aisot Technologies provides an AI-powered investment intelligence platform for asset managers, wealth managers and family offices. Its platform combines machine learning, quantitative models and large language models to deliver portfolio optimisation, risk analysis and predictive investment insights, helping investment teams make faster, data-driven decisions. Founded as an ETH Zurich spin-out, Aisot serves institutional investors across Europe and the US.

People: 11-50

Locations: Zurich

At aisot, you work at the intersection of advanced AI, financial markets, and real-world investment products, close enough to see your ideas move from research into decisions that matter. What makes it truly special is the rare mix of highly skilled people, intellectual ambition, genuine ownership, and a friendly, open-minded culture where strong ideas are challenged, improved, and brought to life together.

Stefan Klauser, CEO

Aleta

Aleta is an AI-native wealth management platform purpose-built for family offices. It consolidates every asset class, public and private, then delivers a verified, real-time view of total wealth for the principal and deep investment reporting for the team, on an open, API-first architecture that allows for a future-proof, best-of-breed tech stack. Born inside a family office and with more than 15 years of wealth reporting expertise, Aleta is modernizing wealth reporting for the next generation of family offices.

People	Locations
11-50	North America, Europe, Asia

What I am most proud of is the team we have built and the environment we have created together. We came to this from inside the industry. We ran a multi-family office before we built this platform, which means the problem we are solving was never abstract for us. That matters for culture in ways that are hard to explain until you experience it. When everyone understands why the work matters, the energy is different. The collaboration is genuine, the ownership is real, and the standard people hold themselves to is high because the clients we serve demand it. We are working on open architecture, a genuine AI layer, and the integrations that serious wealth management has always needed. Watching this team go after those problems with the passion they bring every day is something I do not take for granted

Ken Gamskjaer, CEO & Co-Founder

05

AllVesta

AllVesta provides the AI-powered behavioural intelligence layer that helps banks, asset managers and wealth platforms turn retail savers into confident long-term investors. Combining artificial intelligence with behavioural finance, AllVesta creates dynamic Investor DNA profiles and personalised AI journeys that increase investor confidence, participation and long-term engagement. Founded in 2026 by exited fintech founder Tamara Kostova, former Founder & CEO of Velexa, AllVesta is building the behavioural intelligence infrastructure for the next generation of digital wealth.

People	Locations
2-10	EMEA

"The biggest opportunity in wealth management isn't building better investment products - it's helping millions of people who already have access become investors. At AllVesta, we're focused on the missing link between saving and investing: confidence. We believe the future of financial services will be defined by institutions that understand not just what their customers own, but why they hesitate, what motivates them and what gives them the confidence to act."

Tamara Kostova, Founder & CEO

06

Asseta

Asseta provides an AI-native operating platform purpose-built for family offices, helping firms unify accounting, investment management and financial operations in a single system. Its platform combines a multi-entity general ledger, investment tracking, reporting and workflow automation to replace fragmented legacy tools and spreadsheets. Founded in 2023, Asseta supports sophisticated family offices managing complex wealth structures and oversees more than $100 billion in client assets.

People	Locations
11-50	New York

Despite managing extraordinary levels of wealth and complexity, the family office market has long been underserved by technology that was never truly designed for it. Asseta AI was built to close that gap. Our Intelligent Family Office Suite is purpose-built for the accounting, investment reporting, and financial operations complexity that family offices actually face. That clarity of purpose is exactly what shapes our culture. We attract people with deep domain expertise in family office operations and financial technology who are drawn to this mission because the problem is real and the opportunity to solve it is in front of us. That shared sense of mission is what keeps the bar high, and it is what sets us apart in wealthtech: focused purpose, rigorous standards, and a team that is fully committed to both."

Dean Palmiter, CEO and Co-Founder

07

Astraeus

Astraeus is the AI-native operating system for wealth management, designed to unify every surface of the firm. Its enterprise architecture combines AI, governance and workflow automation to improve operational efficiency, auditability and firm-wide decision-making. Founded in 2025, Astraeus is building intelligence infrastructure designed specifically for the next generation of wealth management.

People	Locations
11-50	New York

Most AI products in wealth management begin at the application layer. Astraeus begins beneath it. Firms cannot become AI-native while their data, rules and institutional knowledge remain fragmented across hundreds of systems. We are building the operating system that creates shared semantic, governance and orchestration layers across the enterprise, so AI agents can operate with the context, controls and accountability wealth management requires. Our ambition is not to add another point solution, but to build the infrastructure on which the next generation of wealth management will run".

Phil Rosen, CEO & Co-Founder

08

aveni

Aveni develops AI solutions purpose-built for financial services, helping wealth managers, financial advisers and banks automate client servicing, compliance and operational workflows. Its platform combines generative AI with financial services expertise to streamline meeting administration, suitability reporting, quality assurance and regulatory monitoring. Headquartered in Edinburgh, Aveni works with leading UK financial institutions and recently raised £12 million to accelerate the adoption of AI across the wealth management sector.

People	Locations
51-200	United Kingdom

Since day one, we've been all about solving the tough challenges in workflow and risk management for financial services, backed by solid AI expertise. Our team is made up of creative, adaptable people who thrive in a fast-paced, ambitious environment. We're all about giving our people the opportunity and support to grow, with the flexibility that comes with scaling a business. Financial services companies take risk seriously and can be cautious when it comes to new tech, so we focus on delivering secure, ethical, and practical solutions. We've built a team of industry experts and top academics to make sure we stay ahead. At Aveni, we're proud of this approach and committed to showing how AI can truly transform financial services."

Joseph Twigg, CEO

09

canoe

Canoe Intelligence provides an AI-powered platform that automates data extraction and document management for alternative investments. Serving 525+ wealth managers, asset managers, institutional investors and capital allocators, the platform transforms unstructured investment documents into accurate, structured data to streamline operations, reporting and compliance. In 2024, Canoe raised a $36 million Series C led by Goldman Sachs Alternatives to accelerate product innovation and global expansion.

People	Locations
51-200	United Kingdom, United States

Being recognized as a 'Top 50 Firm to Work for in Wealthtech' is a tremendous honor and a direct reflection of our team. We've spent over a decade refining our AI to speak the language of alts, and through that work, we've set the industry standard for accuracy and security. But what truly sets us apart is our culture, where every team member is empowered to be both an owner and an innovator. This blend of leading technology and a mission-driven team is what makes Canoe a standout place to build a career."

Jason Eiswerth, CEO

10

CROESUS

Croesus provides secure, high-performance wealth management solutions, including portfolio management, rebalancing tools, AI-based video reporting and APIs. Its technology helps wealth professionals improve productivity, strengthen client relationships and make better-informed decisions. Founded in 1987, Croesus employs more than 250 people across Toronto and Montréal and supports over 20,000 investment professionals managing more than $2.3 trillion in client assets.

People	Locations
201-500	Canada, Switzerland

At Croesus, our success starts with our people. We have built a culture where innovation, collaboration, and continuous learning are more than just values - they are part of our everyday experience. Employees are encouraged to contribute ideas, take on new challenges, and play an active role in shaping solutions that help wealth management firms better serve their clients. This sense of ownership, combined with a strong team spirit and a shared commitment to excellence, creates an environment where people can do their best work and grow professionally.

As a recognized leader in WealthTech, Croesus continues to invest in its people, products, and future. Our industry awards and recognition reflect the talent and dedication of our teams, while our ambitious growth strategy creates exciting opportunities for employees to develop their careers and make a meaningful impact. We are proud to offer a workplace where innovation is celebrated, achievements are recognized, and every employee contributes to our continued success and the future of wealth management technology."

Vincent Fraser, President and CEO

11

d1g1t

d1g1t provides an enterprise wealth management platform that helps wealth managers, family offices and financial advisers deliver data-driven investment advice and portfolio management. Its cloud-based platform combines portfolio analytics, risk management, reporting and client engagement tools in a single solution, enabling firms to automate workflows and deliver highly personalised client experiences. Headquartered in Toronto, d1g1t serves leading wealth management firms across North America.

People	Locations
51-200	United States, Canada

What sets d1g1t apart is our culture of calculated risk-taking and innovation. We encourage our team to think creatively, take initiative, and build cutting-edge solutions. Combined with our commitment to diversity, transparency, and putting people first, we've created an environment where continuous learning thrives, and everyone feels empowered to contribute their unique perspective to drive meaningful impact for our clients and the markets we serve."

Dan Rosen, CEO and Co-Founder

12

ETON SOLUTIONS

Eton Solutions is the only integrated WealthAI platform purpose-built for family offices, wealth managers, and ultra-high-net-worth individuals. Its flagship platform, AtlasFive®, unifies investment management, accounting, reporting, and compliance into a single secure system of record. Powered by EtonAI™, it brings intelligent automation and real-time insight to the world's most complex wealth structures; serving SFOs, MFOs, RIAs, and private equity firms across the US and internationally.

People	Locations
51-200	United States, United Kingdom, India

What attracts great people to Eton Solutions is the chance to work on technology that is both leading-edge and deeply practical. We are building AI-native capabilities for one of the most complex areas of financial services: managing the wealth, structures, documents, entities, investments, and operations of sophisticated families and family offices. With AtlasFive® as the trusted system of record and EtonAI™ as the system of action, our teams are creating intelligent workflows that connect data, decisions, and execution. For talented people who want their work to matter, Eton offers the opportunity to help build the future operating platform for wealth management."

Bryan Henning, President

13

Farther

Farther is an AI-native wealth management firm (RIA). It equips financial advisers with the integrated technology to deliver more personalised wealth-building strategies and grow their practices. Combining portfolio management, financial planning, tax optimisation, and private market access into a single platform, Farther helps advisers streamline operations and improve client outcomes. Founded in 2019, Farther has attracted more than $23 billion in recruited assets and recently raised a $150 million Series D to accelerate its growth.

People	Locations
501-1k	United States

Farther is committed to creating a culture of innovation and empowerment, where advisors can grow their business with the speed, flexibility, and freedom they deserve.

Our cutting-edge Intelligent Wealth Platform enables advisors to deliver unparalleled value to their clients – on their terms. By removing the friction of outdated systems and empowering advisors with modern tools, we're helping them provide their clients with a smarter, more personalized wealth management experience.

Taylor Matthews, Founder

14

FINNY

FINNY provides an AI-powered growth platform built specifically for financial advisers. Its technology uses proprietary data and AI to identify high-intent prospects, automate personalised marketing and streamline client acquisition, helping advisers grow their businesses more efficiently. Founded in 2023, FINNY has raised $17 million and is backed by Y Combinator and leading investors to accelerate AI adoption across the wealth management industry.

People	Locations
11-50	United States

At FINNY, we're building the best AI for financial advisor growth — and having a brilliant team focused on that mission makes it an exciting place to work."

Eden Ovadia, Co-Founder & CEO

15

Flanks

Flanks provides an AI-powered wealth data platform that helps private banks, wealth managers and family offices aggregate, enrich and analyse complex portfolio data. Its platform automates data collection across custodians and asset classes, transforming fragmented information into actionable insights that improve reporting, investment decisions and client servicing. Headquartered in Barcelona, Flanks processes over 500,000 portfolios each month across more than 15 countries, representing over €39 billion in assets.

People	Locations
51-200	EMEA

What convinced me to join Flanks wasn't just the technology, it was the team. 'People first' isn't a slogan here; it shapes how decisions get made day to day. We've brought together people who've spent careers inside financial services with engineers who refuse to accept manual, fragmented data as the norm. That combination, plus the pace of a company scaling fast across Europe to become the wealth data infrastructure, makes this one of the most exciting places to build a career in WealthTech right now."

Sebastian Henrichs, COO

16

GeoWealth

GeoWealth provides a cloud-native turnkey asset management platform (TAMP) for registered investment advisers, combining portfolio management, trading, reporting and back-office services in a single solution. Its open-architecture platform helps wealth managers automate investment operations, scale more efficiently and deliver personalised client experiences. GeoWealth serves more than 200 RIAs and continues to expand its platform through strategic partnerships with leading global asset managers.

People	Locations
51-200	United States, Bulgaria

GeoWealth stands apart with a unified U.S. and European team of over 150 professionals, all working toward transforming how financial advisors serve their clients. From building proprietary portfolio accounting software to pioneering public-private model portfolios, our innovation powers more than $50 billion in platform assets through a fully integrated, open-architecture TAMP. Bolstered by partnerships with leading asset managers like BlackRock, Apollo, J.P. Morgan and Goldman Sachs, we provide the customization, flexibility and scale today's growth-minded advisors and clients require. Founded in 2010 and headquartered in Chicago, we're proud of our U.S./E.U. team for delivering new innovations quarter after quarter."

Cliff Schoeman, Chief Product Officer

17

GPTadvisor

GPTadvisor provides an AI-native platform built specifically for wealth managers, private banks and financial advisers. Its AI agents automate investment research, portfolio analysis, client reporting and proposal generation, helping advisers deliver more personalised advice while reducing administrative workloads. Founded in 2023 by former Allfunds executives, GPTadvisor integrates securely with existing wealth management systems to boost productivity and enhance client engagement.

People	Locations
11-50	Spain, United States

GPTadvisor is a company built for high-agency and creative professionals. We are fast-paced, we are constantly on the AI frontier, and we serve the biggest corporates in financial services. Our team is led by wealthtech entrepreneurs and AI builders who thrive on solving complex problems and pushing the boundaries of what's possible."

Nacho Díaz de Argandoña, Managing Director & Founder

18

Growth Invest

GrowthInvest is a specialist digital investment platform providing advisers and wealth managers with unified access to tax-efficient and alternative investments. The platform supports EIS, SEIS, VCTs, IHT services, and private-market funds within a single, integrated ecosystem. By combining proprietary technology, consolidated portfolio reporting, and full wrapper support, GrowthInvest enables firms to scale alternative investing efficiently, transparently, and compliantly across diversified client portfolios.

People	Locations
11-50	London

At GrowthInvest, we believe alternative assets are an increasingly important component of well-diversified portfolios, and our mission is to make them more accessible, transparent, and efficient for advisers and their clients. As technology adoption accelerates across the UK private wealth sector, demand for private market solutions continues to grow rapidly. This momentum is driving strong expansion across our business, with rising assets under administration, a growing client base, and deeper partnerships with leading wealth managers. We are building a platform and a team focused on innovation, collaboration, and shaping the future of alternative investing."

Daniel Rodwell, CEO

19

IMTC

IMTC delivers the operational infrastructure and intelligence asset and wealth management firms need to optimize across fixed income accounts, execute with precision, and scale with confidence. Built for fixed income managers, IMTC's AI-enhanced platform combines portfolio management, order management, compliance, and reporting in one connected system. Trusted by leading asset managers and wealth management firms, IMTC enables investment teams to make faster, more accurate, and more compliant decisions across portfolios, simultaneously.

People	Locations
11-50	United States

What sets IMTC apart is the sense of ownership every team member feels in shaping our product and our company's trajectory. With most of our team coming from fixed income, we share a passion for delivering long-overdue innovation in the industry, and we get to pursue it with next-generation technology, including embedding artificial intelligence in how we build and how we work. Our culture is built on a shared mission to deliver excellence for our clients, where each person can see a clear link between their work, our success, and the impact we have on the market. That combination of purpose, expertise, empowerment, and the freedom to embrace what's next makes IMTC a special place to work."

Russell Feldman, CEO

20

intelliflo

intelliflo provides cloud-based practice management software for financial advisers and wealth managers. Its platform combines client onboarding, CRM, cashflow modelling, portfolio management, compliance and workflow automation, helping firms streamline the entire advice journey and deliver better client outcomes. Trusted by more than 30,000 advice professionals, intelliflo supports firms overseeing around £505 billion in assets under advice.

People	Locations
201-500	United Kingdom, India

17%

Only 17% of HNWIs describe their wealth advisory experience as seamless and personalised, highlighting a major opportunity for firms using AI, data and modern client engagement technology.

Capgemini, "World Wealth Report 2026" (June 2026) | Source

21

InvestSuite

InvestSuite provides AI-powered, white-label investment platforms for banks, wealth managers and asset managers. Its modular solutions support digital investing, robo-advice, portfolio optimisation and client reporting, helping financial institutions accelerate their digital wealth transformation. Headquartered in Belgium, InvestSuite serves clients across Europe, North America and the Middle East with API-first technology designed to enhance investor engagement and modernise the wealth management experience.

People	Locations
51-200	EMEA, Dubai, New York

Since joining InvestSuite six months ago, I've been struck by the culture here. The company balances a deep care for its people and customers with a constant drive to improve. We're delighted by this recognition, which feels increasingly meaningful as we accelerate growth and expand into new markets."

Will Ferrand, CRO

22

Jacobi

Jacobi provides institutional-grade portfolio construction and analytics software for wealth managers, asset managers and institutional investors. Its cloud-native platform enables firms to design, manage and scale multi-asset portfolios while streamlining risk analysis, model portfolio management and client reporting. Through its open-architecture technology, Jacobi helps investment teams automate workflows, improve investment decision-making and deliver more personalised client engagement.

People	Locations
51-200	San Francisco, London, Brisbane

At Jacobi, we're on a mission to transform how the world's leading investors design and manage multi-asset portfolios. We believe our clients' success is our success, and we never stop innovating to make our platform smarter, faster, and better. Working at Jacobi means joining a collaborative, inclusive team where your ideas matter and your growth is supported. We offer competitive remuneration, flexible work arrangements, global opportunities, and a strong focus on learning and development. Our commitment to diversity and wellbeing ensures that every team member feels valued and empowered. If you're passionate about technology, finance, and making a real impact, Jacobi is the place to build a career that truly matters.

Stuart Reid, Head of Global Marketing

23

Jump

Jump provides an AI operating system built specifically for financial advisers, automating client meeting preparation, note-taking, compliance documentation, CRM updates and follow-up workflows. Its platform helps wealth management firms reduce administrative workloads, improve adviser productivity and deliver a more personalised client experience. Founded in 2023, Jump is trusted by more than 35,000 advisers and recently raised an $80 million Series B to accelerate its growth.

People	Locations
201-500	Salt Lake City

At Jump we are empowering wealth advisors, financial services and their clients to thrive in the age of AI. Just as important as our impact in the industry is the team we build - a team that operates with velocity, world class work quality standards, and teamwork that is direct, kind, and no drama. We want every team member who works at Jump to experience a massively positive career inflection point here."

Parker Ence, CEO & Co-Founder

24

Kidbrooke

Kidbrooke provides an API-first investment and wealth analytics platform that helps banks, insurers and wealth managers deliver digital financial planning and advice. Its cloud-native technology combines financial modelling, portfolio analytics and predictive forecasting to power personalised client experiences and automate complex investment workflows. Founded in 2011, Kidbrooke serves financial institutions across Europe and the Middle East through its unified KidbrookeONE platform.

People	Locations
11-50	Stockholm, London, Dubai

Kidbrooke is a close-knit, dynamic team that shares a strong work ethic and genuine passion for what we do. In a small, hands-on environment, you're constantly learning, collaborating, and tackling new challenges together, contributing to something that makes a real impact. It's a place where you grow, have fun, and feel valued every day."

Fredrik Daveus, CEO & Co-Founder

25

KURTOSYS

Kurtosys provides cloud-based digital engagement and reporting solutions for asset managers and wealth managers. Its platform combines automated client reporting, investor websites, secure client portals and data management tools to help firms streamline investment communications and deliver personalised digital experiences. Founded in 2002, Kurtosys supports many of the world's leading investment managers through its scalable, API-driven platform.

People	Locations
51-200	London, United States, South Africa

At Kurtosys, I'm constantly energised by our incredibly smart teams. Spanning the US, UK, and South Africa, our diverse perspectives bring fresh thinking to every challenge."

Michelle Wright, Chief Product Officer

26

lemon.markets

lemon.markets provides API-first brokerage and custody infrastructure that enables banks, wealth managers and fintechs to launch investment products quickly and compliantly. Its modular platform supports digital onboarding, trading, custody, settlement and regulatory services, allowing firms to build and scale modern investing experiences without managing the underlying infrastructure. In 2024, lemon.markets raised €12 million to accelerate the expansion of its brokerage-as-a-service platform across Europe.

People	Locations
51-200	Berlin

At lemon.markets, we're building more than infrastructure - we're creating an environment where talented people can shape the future of investing. Our mission to grow investing opportunities for all European customers and businesses starts with enabling our team to think big, take ownership, and challenge what's possible. By combining deep technical expertise with a culture rooted in collaboration and empathy, we empower our lemoneers to deliver impact from day one."

Max Linden, Founder & CEO

27

lyfeguard

Lyfeguard provides client intelligence infrastructure for wealth managers, financial advisers and private client firms. Its secure platform helps clients organise and share financial, legal and personal information, giving advisers a more complete view of client circumstances while improving onboarding, ongoing servicing and intergenerational planning. Headquartered in London, Lyfeguard is helping firms transform fragmented client records into richer, permissioned client intelligence.

People	Locations
2-10	United Kingdom

We give people clarity and peace of mind when it matters most. To deliver that externally, we live it internally with a culture rooted in deep trust, radical support, and shared ownership. The product is a direct reflection of our team, and this award is a testament to how they show up for our users and each other every single day.

Fraser Stewart, Co Founder & Chief Commercial Officer

28

masttro

Masttro provides a wealth management platform purpose-built for family offices, private banks and wealth managers overseeing complex portfolios. Its platform consolidates data across liquid and alternative assets, automates reporting and portfolio management, and delivers AI-powered insights through a single, secure view of client wealth. Trusted by over 10,000 users across 40+ countries, Masttro connects to more than 700 custodians and financial institutions worldwide.

People	Locations
51-200	United States, EMEA, Dubai, Mexico

$98.3 trillion

Global high-net-worth individual wealth increased 8.7% in 2025, reaching a record $98.3 trillion, while the global HNWI population rose to 25.3 million individuals.

Capgemini, "World Wealth Report 2026" (June 2026) | Source

29

MDOTM

AI-DRIVEN INVESTMENT SOLUTIONS

MDOTM is a global provider of AI-driven investment solutions for asset and wealth managers. Its platform, Sphere, combines analytical and generative AI to support better investment decisions, portfolio construction at scale, and automated client commentary. It aims to replace fragmented, manual investment workflows with a single intelligent platform trusted by leading financial institutions globally.

People	Locations
51-200	United States

When we founded MDOTM ten years ago, we started with a simple belief: the best investment decisions emerge when rigorous science, human expertise, and AI work together. Everything we've built since then reflects that conviction.

Today, MDOTM is a team of physicists, data scientists, engineers, and investment professionals united by intellectual curiosity, ambition, and a relentless commitment to excellence. Those values aren't slogans, they shape how we work every day globally. The institutions that choose MDOTM aren't simply adopting a technology platform. They're partnering with a team that is genuinely obsessed with advancing the science of investing and helping clients make better decisions. I'm proud of what we've built over the past decade, and even more proud of the people who made it possible."

Tommaso Migliore, CEO and Co-Founder

30

MYFO

MyFO provides an AI-powered operating platform for family offices and their advisers, bringing investment data, reporting, document management and governance into a single secure system. The platform consolidates information across multiple entities, asset classes and financial institutions, helping users automate workflows and gain a real-time view of complex wealth structures. Founded in 2021, MyFO is built on a foundation of customer excellence, dedicating deep resources and expertise to developing tools purpose-built for the complexity of family office wealth.

People	Locations
2-10	Canada

At MyFO, we've built a culture centered on solving meaningful challenges for our clients while empowering our team to make a tangible impact every day. Our people have the opportunity to shape our product, influence strategic direction, and help some of the world's most sophisticated wealth management firms operate more effectively. That combination of ownership, innovation, and collaboration is what makes MyFO such a rewarding place to build a career."

Elle Heron, Head of Partnerships

31

onevest

OneVest is a financial technology company redefining wealth management through an intelligent, agentic operating system. By advancing fragmented legacy software with a unified, AI-native platform built for autonomous execution, OneVest enables firms to operate with greater speed, control, and scale. Its open architecture deploys intelligence across the enterprise, transforming operations and freeing advisors to grow. OneVest serves financial institutions across the U.S., Canada, and global markets.

People	Locations
51-200	Toronto, Canada

What sets OneVest apart is our refusal to settle for legacy thinking. We've cultivated an environment where tomorrow's technology intersects with an innovative, bold mindset, giving our talented team the space to actively build our Agentic Wealth Operating System. We believe in being as flexible and agile in our thinking as our platform is, fostering an inclusive environment from day one where every team member acts as a sounding board to challenge the status quo. By anchoring our collaboration in honesty and mutual trust, we ensure that great ideas win. Ultimately, OneVest is a place where continuous professional growth is part of the daily experience, offering ambitious individuals a true launchpad to thrive

Jakob Pizzera, Co-Founder & Chief Operating Officer

32

Otto.

Otto provides an AI-powered workflow automation platform built specifically for wealth managers and financial advisers. It runs client servicing processes end-to-end, from onboarding and annual reviews through suitability reporting, meeting capture and client communication, with control, auditability and management information embedded in how the work is done. Otto integrates with existing wealth management systems, so firms get consistent execution, stronger compliance and a more personalised client experience while freeing advisers to spend more time with clients.

People	Locations
11-50	London

We're building at the frontier of AI in wealth management, which means everyone here gets to work on genuinely hard, unsolved problems with real impact for our clients. We've kept the team small and the bar high, so people get a huge amount of ownership early. The pace is fast, the autonomy is real, and you're surrounded by people who care deeply about getting it right."

Madeleine Debney, CEO & Co-Founder

33

Palindrome

Palindrome provides an AI-native operating platform built specifically for wealth managers and private banks. Its agentic AI automates client onboarding, annual reviews, compliance, document generation and adviser workflows, integrating seamlessly with existing CRM and wealth management systems. Trusted by firms representing more than $100 billion in client assets, Palindrome helps wealth managers improve productivity, strengthen compliance and deliver a more personalised client experience.

People	Locations
11-50	United Kingdom

What makes Palindrome a standout place to work is the calibre of the people and the trust we place in them. We're a tight, high-calibre team solving genuinely difficult problems at the intersection of AI and wealth management, and we run on our own agents day to day, so everyone here operates with the leverage of a much larger team. That combination of ambition, autonomy, and amplification is what sets us apart."

Ed Beckett, Co-Founder

34

PERFORMATIV

Performativ provides the operating system powering tomorrow's wealth management. Built by wealth and asset managers, investment advisors, financial institutions, and multi family offices, the platform unifies portfolio management, reporting, compliance, trading, and data aggregation in a single system. By combining AI-powered automation with modern infrastructure, Performativ replaces fragmented legacy technology, enabling organizations to scale efficiently, adapt to evolving client expectations, and deliver more transparent, data-driven investment services.

People	Locations
51-200	Copenhagen, London, Amsterdam, Zurich

Performativ is for people who want to have an outsized impact. We're building the operating system powering tomorrow's wealth management and helping drive one of the biggest technology transformations in financial services. To do that, we've created a culture that values ownership, curiosity, and execution over hierarchy and politics. Every team member is trusted to take initiative, challenge assumptions, and contribute beyond their job title. That's how great products are built, and it's what makes Performativ a unique place to work."

Albert Geisler Fox, CEO

35

PlannerPal

PlannerPal provides an AI-powered workflow platform built specifically for financial advisers and wealth managers. Its platform automates meeting preparation, note-taking, client reports, CRM updates and compliance documentation, helping advisers reduce administrative workloads and spend more time with clients. Trusted by UK advice firms managing over £150 billion in client assets, PlannerPal integrates with leading wealth management systems to streamline the entire advice process.

People	Locations
11-50	United Kingdom

AI is reshaping every profession, and we're determined to ensure financial planners are among those who benefit most. PlannerPal is building the platform that helps advisers harness AI to save time, deliver a better client experience, and focus on the work only people can do. To achieve that, we've built a culture around ownership, curiosity and continuous learning. Everyone is trusted to make decisions, challenge ideas and have a visible impact—because the best products are built by teams that never stop asking questions."

Mark Whitcroft, CEO and Co-Founder

36

.point

Point is an investment data intelligence platform built for wealth and asset managers. It unifies fragmented client, portfolio and market data into a single, trusted source of truth - enabling advanced analytics, automated reporting and AI-driven workflows. By replacing manual processes and siloed systems, Point helps firms operate more efficiently, make better decisions and deliver a more sophisticated client experience.

People	Locations
2-10	United Kingdom, Switzerland

“We're building Point to solve one of the most fundamental problems in investment management: fragmented, unreliable data. By creating a single, trusted foundation for client and investment data, we enable firms to move faster, operate with confidence, and unlock the full potential of AI.

What makes Point a great place to work is the combination of deep industry expertise and a shared ambition to redefine how the industry operates. Our team brings together investment professionals and technologists who have lived these challenges and are driven to solve them properly.

As we continue to grow, we're focused on building a culture of ownership, collaboration, and intellectual curiosity - where people are empowered to challenge convention and deliver meaningful impact for our clients and the market as a whole.”

Tom Williams, CEO

37

QPLIX

QPLIX is a leading provider of a holistic software solution for digital wealth management. Founded in 2012 by Kai Linde, Philipp Pötzl and Mathias Lindermeir, the software company's SaaS platform is used by asset managers, family offices, foundations, funds and institutional investors worldwide. QPLIX supports all liquid and illiquid asset classes and complex legal structures. The company thus enables financial experts to manage their portfolios holistically and efficiently. At its headquarters in Munich and selected international locations, an interdisciplinary team of over 170 software developers and financial experts ensures the continuous development of the platform and user satisfaction.

At QPLIX, we are a team that supports, inspires, and challenges each other. Joining us means being listened to and being encouraged to question things, developing quickly, and gaining experiences that are hard to find elsewhere. The combination of ambitious change, personal growth, and reliable teamwork makes QPLIX a truly unique employer."

Kai Linde, Founder

People	Locations
51-200	Germany, Switzerland

38

quantifi

Quantifi provides enterprise risk, analytics and trading software for banks, asset managers, hedge funds and institutional investors. Its integrated platform combines portfolio analytics, pricing, trading, risk management and regulatory reporting, enabling firms to manage complex financial products through a single, cloud-native solution. Founded in 2002, Quantifi serves more than 200 clients across 40 countries, including many of the world's largest banks and asset managers.

At Quantifi, we've created a collaborative environment where innovation and growth are part of everyday work. Our team is encouraged to take ownership, be creative, and contribute to solutions that help clients manage risk, analytics, and trading with confidence. Today, more than 200 clients in 40 countries, including many of the world's leading banks, asset managers, hedge funds, pension funds, insurers, and commodity trading firms, rely on our technology. With supportive benefits, wellness programs, and a culture of continuous learning, Quantifi is a place where people can develop their careers while making a meaningful impact."

Rohan Douglas, CEO

People	Locations
51-200	United States

39

QUANTILIA

Quantilia is a multi-asset portfolio reporting platform built for institutional investors. It consolidates data from 650+ sources, applies thousands of automated quality controls, and delivers consolidated reporting across all asset classes: listed assets, private equity, real estate, infrastructure, and fixed income. The platform serves insurers, pension funds, sovereign wealth funds, and asset managers who need fund lookthrough, solvency analysis, ESG analytics, and cash flow tracking in a single, auditable environment. Founded in 2017, Quantilia monitors over $250 billion in client assets across 8 countries, with 100% client retention over four consecutive years.

At Quantilia, we solve one of the most complex challenges in institutional investment: giving asset owners a clear, consolidated view of their entire portfolio, across every asset class, every data source, and every reporting cycle. What makes this place special is the combination of deep financial expertise and engineering talent working side by side, with a shared obsession for data quality. Our team operates across 8 countries, serving 60+ institutional investors who trust us with over $250 billion in assets, and every one of them has stayed with us year after year. That level of client loyalty says more about our culture than any mission statement could."

Florian Garivier, CEO & Co-Founder

People	Locations
11-50	Nice, France

40

Savvy

Savvy Wealth provides an AI-powered wealth management platform that helps financial advisers grow their practices through integrated technology and operational support. Its platform combines CRM, portfolio management, financial planning, client engagement and AI-driven workflow automation, enabling advisers to spend more time with clients and less on administration. Founded in 2021, Savvy supports more than $10 billion in assets under management and recently raised a $72 million Series B to accelerate its growth.

People	Locations
51-200	New York

"What makes Savvy unique is how close we stay to the people we serve. Our mission, to make great financial advice easier to deliver, isn't just a north star, it's something our customers help us live out day to day. Our advisors are in our channels, they shape our key decisions, some even work from our offices. That closeness, paired with a culture that questions 'how it's always been done' and thinks from first principles, is what lets us build genuinely innovative solutions, together."

Rasika Rajagopalan, VP of People and Places

41

swissQuant

swissQuant builds the quantitative infrastructure financial organizations rely on to manage risk, drive investment performance, and meet regulatory demands. Spun out of ETH Zurich in 2005 to bring quantitative engineering out of academia and into practice, the firm has served 200+ institutions, from private banks and wealth and asset managers to clearing houses and insurers.

People	Locations
51-200	Switzerland

We are built by quants and trusted by institutions, and everyone here feels both halves of that sentence. There are no layers between our people and our clients: the engineering teams who design a risk model are the ones discussing it with the bank that runs it. That does something powerful for a career. Your work ships, your name is on it, and the institutions relying on it manage real capital under real scrutiny. The culture that grows from that is rigorous, direct, and deeply collegial, a place where the sharpest thinking wins. If you want your best work to reach the market, this is where it happens."

Dr. Hassan Mouheb, CEO

42

UNIQUE

Unique AI provides an enterprise AI platform built specifically for financial institutions, helping wealth managers, private banks and asset managers automate research, compliance and client servicing workflows. Its platform combines secure AI agents, investment analysis and enterprise-grade governance to improve productivity while meeting strict regulatory requirements. Trusted by more than 40 financial institutions, Unique helps firms accelerate AI adoption and modernise wealth management operations at scale.

People	Locations
51-200	EMEA, United States, UK, India

Unique AI sits at the intersection of wealth management and agentic AI — two of the most exciting frontiers in finance — and our team gets to shape both. We build the platform that frees bankers and advisors from paperwork so they can focus on clients, and that mission attracts exceptional engineers, data scientists, and finance experts. Our culture rewards curiosity, ownership, and trust; we ship into the world's most regulated environments and celebrate people who push what AI can responsibly do in finance. Deep technical ambition meets measurable industry impact — that's what keeps us energized."

Michelle Heppler, Chief Customer Officer & Co-Founder

43

UNIVERIS

Univeris provides enterprise wealth management software for financial advisers, wealth managers, banks and investment firms. Its integrated platform supports client onboarding, portfolio management, trading, compliance and back-office operations, helping firms streamline investment workflows and deliver a modern digital advice experience. Founded in 1991, Univeris supports more than 85,000 advisers and over $589 billion in assets under administration across 12 countries.

People	Locations
51-200	North America, Latin America, EMEA

Univeris is a leading global wealth management platform. With decades of domain expertise and a future-ready mindset, Univeris helps financial institutions and advisory firms achieve operational excellence, grow their share of wallet, and stay ahead of regulatory challenges and competition. Dedicated solely to the wealth management sector, their unified, digital platform enables investors and advisors to manage multiple investment products on one comprehensive, end-to-end system.

As a global, trusted technology partner, Univeris operates in North America, Latin America and EMEA. The company employs hundreds of team members all over the globe, with major offices in Toronto and Madrid. Univeris' people are central to its core deliverables: its robust technology platform and its knowledgeable and dedicated client success. Univeris employs some of the brightest and most talented people to solve the wealth management industry's most complex challenges. Core to its corporate values, team members work together to find solutions to new problems, act with integrity, maintain a passion for learning, and operate transparently."

Tomas Edwards, Commercial Lead EMEA

44

WEALTH DYNAMIX

Wealth Dynamix provides a client lifecycle management platform purpose-built for private banks, wealth managers and family offices. Its cloud-based solution combines CRM, digital onboarding, workflow automation, compliance and client servicing in a single platform, helping firms streamline operations and deliver a seamless client experience. Headquartered in London, Wealth Dynamix supports leading global wealth managers overseeing more than $750 billion in client assets.

People	Locations
51-200	London, Switzerland, Paris, Vilnius

At Wealth Dynamix, our mission is simple: to give bankers their time back. When relationship managers are freed from administrative burdens, they can focus on what truly drives value, building trusted relationships, delivering exceptional client experiences, and growing their business. Our platform makes this possible by embedding compliance by design, driving operational excellence, and harnessing AI to transform the wealth of data firms already possess into actionable intelligence. Just as importantly, we work alongside a carefully curated ecosystem of specialist partners, ensuring our clients benefit from the very best expertise, innovation, and capabilities the industry has to offer."

Francois De Lescure, CRO

45

wealthreader

WealthReader provides an API-first financial data aggregation platform that enables banks, wealth managers and fintechs to access real-time banking, investment and wealth data through a single integration. Going beyond traditional Open Banking, its platform consolidates information across accounts, portfolios, pensions, loans and other financial assets, helping firms automate reporting, portfolio transfers and wealth management workflows. Headquartered in Madrid, WealthReader is authorised by the Bank of Spain and operates across multiple international markets.

People	Locations
51-200	EMEA, United States, UK, India

At WealthReader we're building the next generation of open banking entirely in-house, with a team that has been shaping this market from scratch for over a decade. What makes it a great place to work is that everyone here gets to solve genuinely hard problems at the frontier of financial data, with the autonomy of a startup and the depth of expertise of people who have already built and scaled a category leader."

David Lozano Lucas, CEO

46

WEALTHARC

WealthArc is a global financial data infrastructure company making financial data accessible, trusted and usable for humans, AI and autonomous systems. Its platform connects to custodians and financial data sources worldwide, transforming fragmented information into standardised, AI-ready financial objects. This enables WealthTech and FinTech companies, wealth and asset managers, family offices and private banks to automate workflows, generate insights and build intelligent applications. WealthArc serves clients globally and has been recognised by WealthBriefing, AIFinTech100 and WealthTech100.

People	Locations
11-50	Zurich, Warsaw, United States

Artificial Intelligence is rapidly transforming wealth and asset management, but its true potential depends on high-quality and trusted data. At WealthArc, our mission is to make investment data usable for AI by transforming fragmented information into standardized, cleaned, reconciled, and validated investment intelligence that AI systems can understand, consume, and act upon.

What makes WealthArc a great place to work is the opportunity to solve one of the industry's most complex challenges alongside a highly skilled, ambitious international team while helping build the future of investment intelligence. As a lean and entrepreneurial organization, WealthArc empowers every employee to take ownership, make an impact, thrive professionally, and grow with the company."

Artur Kluz, CEO

47

Wealthcome

Wealthcome provides a cloud-native wealth management platform for financial advisers, family offices and financial institutions. Its all-in-one solution combines portfolio data aggregation, CRM, regulatory compliance and client engagement tools, helping firms automate workflows and deliver a complete view of client wealth. Founded in 2022, Wealthcome supports more than 700 firms, 4,500 professionals and over €55 billion in aggregated assets.

People	Locations
51-200	Bordeaux

Wealthcome has grown fast — especially since our Series A in 2025 — and that acceleration was only possible because of the quality of the people we brought in from day one. What I'm most proud of is that we've kept them: we invest deliberately in retention, we promote from within, and we give high performers room to take on more, quickly. Great talent is what built Wealthcome, and growing that talent is what keeps it a great place to work."

Gabriel Alphen-Ginet, Chief of Staff

48

WealthObjects

WealthObjects is a modular, AI-powered white-label wealth platform that enables banks, wealth managers, insurance firms, and regulated investment institutions to launch and run modern wealth and advice propositions fully under their own brand. Its AdviceObjects platform delivers a regulated, AI-enabled onboarding, planning, advice and suitability solution for UK financial advisers and wealth managers. The wealth management industry has spent decades stitching together disconnected systems and manual processes.

WealthObjects exists with a clear purpose: to build a better way. AI is creating a genuine opportunity to rethink how advice and wealth management are delivered, and that is exactly what we are doing.

People	Locations
11-50	London, Hyderabad

WealthObjects is one of those rare environments where the problem genuinely matters and the team genuinely cares. We are a small, focused group spread across two countries, but the culture feels unified. Our team spans the UK and India, blending financial services expertise with world-class engineering and AI capability - building technology that will define how wealth management is delivered for the next generation. People here are given real ownership from day one, work directly with clients and see the impact of what they build. For anyone who wants to work at the intersection of financial services and AI, where their contribution is visible, this is that place."

Praveen Chagapuram, COO

49

YCHARTS

YCharts provides an AI-powered investment research and client engagement platform for financial advisers, wealth managers and asset managers. Its platform combines market data, portfolio analytics, proposal generation and client reporting, helping firms make better investment decisions and strengthen client relationships. Trusted by thousands of financial professionals across North America, YCharts continues to expand its AI capabilities to streamline research and adviser workflows.

People	Locations
51-200	United States

The companies that outperform over time are the ones that never see people and performance as separate strategies. At YCharts, we invest in both with equal intention because extraordinary businesses are built by people who are trusted to do extraordinary work."

Olga Spivak, SVP of People

50

zocks

Zocks provides a privacy-first AI platform built specifically for financial advisers and wealth management firms. Its AI assistant automates meeting preparation, note-taking, CRM updates, client communications and compliance workflows, helping advisers save time and strengthen client relationships. Founded in 2022, Zocks serves thousands of financial advisers and recently raised a $45 million Series B to accelerate AI innovation across the wealth management industry.

People	Locations
51-200	United States

We started Zocks with a straightforward goal: to give financial advisors the tools and intelligence to deliver the exceptional service all of their clients deserve, without getting buried in the operational work that gets in the way. We've built an AI platform advisors love and a team that ships fast, knows our customers deeply, and sees the impact of their work every day."

David Shabotinsky, Chief of Staff

About Search Chain Partners

Search Chain Partners is a specialist FinTech search firm, providing high-calibre GTM/Sales, technology, product and strategy-focused talent to some of the most influential firms shaping the future of financial services.

We partner with high-growth, investor-backed businesses across WealthTech, RegTech, AI for Finance, Private Markets Tech, Capital Markets Tech, Buyside Tech, InsurTech and Payments, helping them build the teams that turn product-market fit into market leadership.

LONDON
81-87 High Holborn,
London
WC1V 6DF
contact@searchchainpartners.com