Wealth.com is the industry’s leading estate and tax planning platform, empowering thousands of wealth management firms to modernize how planning guidance is delivered to clients. Purpose-built for financial institutions, Wealth.com is the only tech-led, end-to-end platform that enables firms to scale estate and tax planning with efficiency, consistency and measurable client impact.

Trusted by some of the largest names in finance, Wealth.com combines proprietary AI, enterprise-grade security, and deep legal and tax expertise to support the full spectrum of client needs—from foundational estate plans to advanced estate and tax analysis and reporting. With the introduction of Wealth.com Tax Planning, firms can deliver more integrated, proactive planning through a single platform. Wealth.com has been widely recognized for innovation and leadership, earning Top Estate Planning Technology and Top Estate Planning Implementation at the 2025 WealthManagement.com Industry Awards, as well as the #1 estate planning market share in the 2025 Kitces AdvisorTech Study.