

Building AI-Native Infrastructure: Empowering Wealth Managers with True Self-Service

Wealth management faces fragmented data from custodians, CRMs, PDFs, and APIs—driving manual reconciliation, delays, and lost insights. AI-native infrastructure, built ground-up for agentic AI, changes this.^[6]

Deployable in your Cloud account (overlay or standalone) with full admin access, it enables self-service:

- **Ingest Anything:** Agentic AI bots extract from portfolios, banks, SFTPs, browsers—no ETL.
- **Unified Data:** Automated cleaning and single model across operations.
- **Safe Customization:** Guardrails for coding (role-based access, PII blocks, logs) support compliant workflows.
- **Autonomous Scaling:** Host data internally, customize bots, cut costs via self-service analytics.^[7]

Unlike legacy systems needing constant support, these enable proactive bots that learn and report.^[8]

Industry Outlook

By 2035, agentic AI will automate rebalancing and risk, per McKinsey—AI-native firms lead.^[4]

What's your top data challenge? Comment!

#WealthTech #AINative #AgenticAI

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