

Beyond the Buzz:

2025 Private Wealth Manager's AI Consultant Buyer's Guide.

Who This Guide Is For:

- Founders, COOs, & Managing Partners at wealth & asset managers
- Product and innovation leads
- CMOs, content directors, heads of research, investor relations, and client servicing leaders
- Financial industry trade publications and organizations creating member tools and educational content.

If you're exploring AI capabilities and planning to prepare your practice or organization for the future, this guide is written for you.

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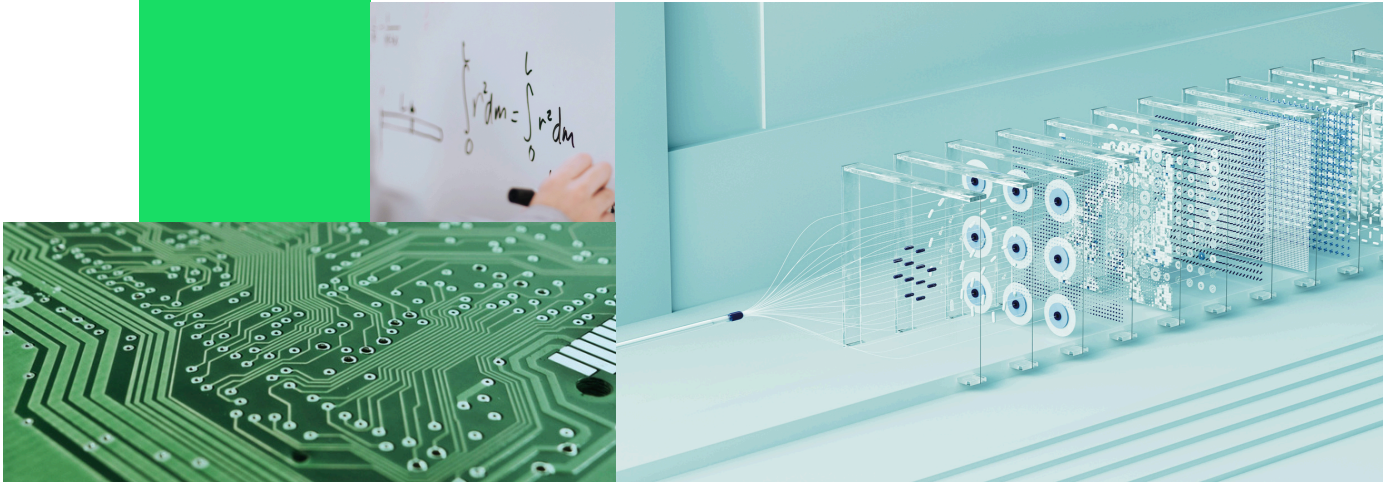
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Provides key guidelines for successful AI deployment in financial organizations.

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Emphasizes the importance of custom-built AI solutions over generic tools for financial services.



01 | Why AI, Why Now



The wealth management industry stands at an inflection point. As ~\$83 trillion of global wealth is set to transfer to younger generations by 2045, traditional advisory models face disruption from both changing client expectations and technological innovation. Tech-savvy heirs aren't just questioning conventional investment strategies—they're actively seeking advisors who leverage advanced tools to deliver timely insights as well as a highly personalized relationships and experiences that combine digital efficiency with human expertise creativity.

\$83 trillion global generational wealth transfer underway from older to younger generations with a big chunk of this transfer expected over the next 10 years.

—UBS Global Wealth Report 2024

To be successful, the next wave of advisory firms, family offices, and asset managers must realize that AI can do more than summarize PDFs or generate LinkedIn posts—it can enhance relationships and build trust by providing powerful insights while also delivering the digital-first experience the next generation of clients expect. Research shows that while 80% of investors trust digital wealth platforms, 45% still prefer human assistance for complex decisions. **Wealth practices need to be "both fully digital and fully human."** Even among millennials and younger investors, only about 15% are comfortable with a purely digital interaction model—the vast majority want a professional relationship with a technology-enhanced human advisor.

02 | Where AI is Already Adding Value in Financial Services

Use Cases

Generative AI delivers the greatest impact when it's developed to solve real problems—not bolted on as a gimmick. But most successful implementations start small: a single high-impact task that proves value and builds momentum. Below are six areas where firms in private wealth and alternatives are already seeing measurable results.

Business Area	AI Use Cases	Why It Matters
Due Diligence & Investment Research	Document summarization, language/sentiment analysis, unstructured data mining, analyst co-pilots	Speeds up reviews, improves consistency, and frees analysts for higher-order insights
Marketing & Content Creation	Draft articles, newsletters, whitepapers, and SEO content aligned with brand strategy	Scales thought leadership, shrinks content timelines, enables segment-level personalization
Client Reporting	Auto-generate summaries, charts, and performance commentary by client tier or portfolio	Delivers timely updates, enhances perceived service quality, and reduces manual errors
Lead Prospecting	AI-augmented research and scoring of prospects from public and private sources	Prioritizes high-conversion targets, boosts BD focus, and expands TAM visibility
Compliance & Legal	Draft and review contracts, policies, disclosures, marketing and sales materials	Streamlines routine legal work, increases auditability, and catches issues early
Client Onboarding & Servicing	Dynamic intake forms, document generation, AI chat for FAQs and support	Cuts onboarding time, improves client satisfaction, and scales service without scaling headcount

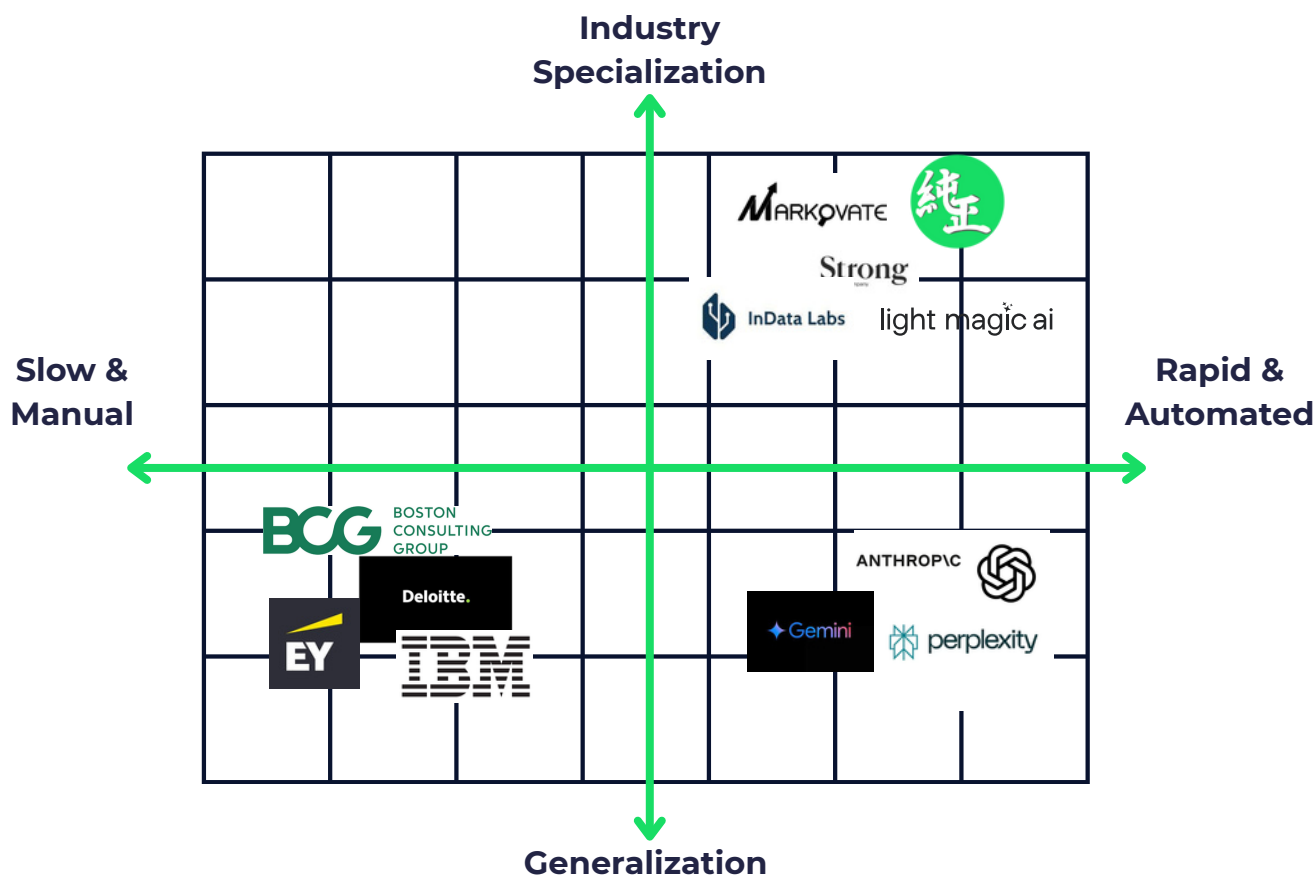
These are not theoretical. Forward-looking firms are already using AI to automate manual processes, unlock siloed data, eliminate redundancies, and deliver better results with fewer resources.

But unlocking that value takes more than a ChatGPT subscription or a generic LLM integration. It takes a creative partner who understands the nuances of your business and the technical complexity of AI systems—someone who can build real solutions to real problems.



03 | The AI Partner Spectrum

There's no shortage of firms offering generative AI products and services—but all are not created equal. **The right partner should already understand your industry, not learn it on your dime.** Selecting the right partner also depends on three factors: the complexity of your use case, the maturity of your data infrastructure, and your appetite for custom development.



Firms solving isolated problems may find value in off-the-shelf tools. But those aiming to build defensible, long-term advantages—and close the AI gap quickly—need a partner who can go deep: on data, on systems, and on business context. One who can help craft both a strategy and execution plan, and then actually execute.

04 | Seven Questions to Ask When Choosing an AI Partner

- 1 Do they speak your industry fluently?**
In most industries, nuance in language isn't cosmetic—it's critical.
- 2 Can they tailor solutions to your processes?**
Or are they selling one-size-fits-all tools with rigid, templated use cases?
- 3 Will they work with your messy, unstructured data?**
Or do they expect clean, labeled inputs before they begin?
- 4 How do they integrate with your internal systems and APIs?**
Real value comes from fitting into your existing tech stack—not replacing it.
- 5 Do they offer training and ongoing support?**
Or do they hand over a solution and disappear?
- 6 Can they build for scale?**
Have they built enterprise-grade solutions—and can they grow with you?
- 7 Do they understand organizational change, not just AI?**
Success isn't just technical. It requires clear planning, internal buy-in, and change management.

05

Market Landscape: Where Customization Lives

Firm	Industry Focus	Custom LLM	System Integration	Handles Messy Data	Training & Change Mgmt	Enterprise Capable	Ideal For
Pure Math AI	Finance-native	Yes	Yes	Yes	Yes	Yes (niche)	Small to Large
Strong Analytics	Cross-industry	Yes	Yes	Yes	Partial	Yes	Mid-size to Large
Light Magic	Creative	Yes	Yes	Limited	Yes	Moderate	Small to Mid-size
InData Labs	Cross-industry	Yes	Yes	Yes	Partial	Yes	Mid-size to Large
Markovate	Cross-industry	Yes	Yes	Yes	Partial	Yes (mid-size)	Mid-size
EY, Bain, Deloitte, Accenture Big 4 Consultants (grouped)	All	Yes	Yes	Yes	Yes	Yes	Large Enterprises with Deep Pockets
OpenAI	General-purpose	Yes	Yes	Partial	No	Yes	Large Enterprises with Deep Pockets
Google	General-purpose	Yes	Yes	Yes	Yes	Yes	Large Enterprises with Deep Pockets

The landscape of AI vendors is crowded—but not all partners are built for the nuanced demands of financial services.

Our goal is to cut through the noise. This isn't a comprehensive list. It maps vendors by core capabilities—what they build, who they may work best for, and where they may fit into your planning.



05 | Market Landscape: Profile

Pure Math AI



Pure Math.AI

Overview

A boutique generative AI consultancy with deep expertise in alternative investments, wealth management, and financial services. Pure Math AI builds highly tailored solutions, working closely with clients on development, integration, and adoption.

Key Capabilities

- **Industry Focus:** Private Wealth, Alternative Investments, Healthcare
- **Custom GenAI:** Yes – Model agnostic solutions and workflow tools
- **System Integration:** Yes – API design, embedded workflows, and document automation
- **Handles Messy Data:** Yes – excels at parsing complex documents and working with large data sets.
- **Training & Change Management:** Moderate – in collaboration with partner.
- **Enterprise Capable:** Yes (in niche) – Focused, high-impact deployments for individuals, teams, and enterprises.
- **Location & Languages:** Global remote; multi-lingual team and solutions (English, Japanese, Chinese, Korean.)

Ideal For

Small to large wealth and asset managers, investment platforms, and trade organizations seeking a finance-native AI partner to operationalize custom use cases—without the overhead of a generalist consultancy.

What Their Website Says

- Purpose-built for wealth management and alternative investments
- Designs custom generative AI solutions for due diligence, compliance, and reporting
- Led by financial industry and silicon valley veterans with deep expertise in alternative investments, wealth management management, and AI.

Questions to Ask

- What use cases do they prioritize for wealth and alternatives, and why?
- How do they ensure alignment with compliance, documentation, and audit workflows?
- What does collaboration look like across product, ops, and advisor teams?



05 | Market Landscape: Profile

Strong Analytics

Strong
A OneSix Company

Overview

A machine learning and AI development firm with strong engineering rigor. Known for solving complex data science problems across diverse industries, Strong Analytics offers full-stack development, including generative AI.

Key Capabilities

- **Industry Focus:** Broad – tech, healthcare, pharma, retail, etc.
- **Custom GenAI:** Yes – builds bespoke models and apps (incl. GenAI)
- **System Integration:** Yes – end-to-end deployments into client stacks
- **Handles Messy Data:** Yes – strong data engineering capabilities
- **Training & Change Management:** Partial – collaborative delivery, limited formal training
- **Enterprise Capable:** Yes – supports projects from startup to Fortune 500
- **Location & Languages:** U.S.-based (Chicago HQ), English

Ideal For

Mid-to-large orgs with strong product or data teams seeking a builder to design and deploy a GenAI, ML, or analytics solution.

What Their Website Says

- Designs and deploys custom AI/ML solutions with full-stack engineering support
- Highlights experience across sectors, including fintech and digital investing (e.g. Stash)
- Emphasizes a team of PhDs and a commitment to scientific rigor and bespoke modeling

Questions to Ask

- What direct experience does the team have in wealth management or alternative investments?
- Are they familiar with regulatory and compliance expectations in finance?
- Can they act as a strategic partner (bringing insider industry know-how) , or focus purely on technical execution?

05 | Market Landscape: Profile

Light Magic

light magic ai

Overview

A creative AI firm focused on human-centered, design-first generative AI tools. Light Magic blends prompt engineering, UX, and automation to build bespoke GPT-based tools and adoption strategies.

Key Capabilities

- **Industry Focus:** Creative and business automation
- **Custom GenAI:** Yes – GPT-based agents, workflows, and internal copilots
- **System Integration:** Yes – via lightweight APIs and no-code tools
- **Handles Messy Data:** Limited – works with user-ready data
- **Training & Change Management:** Yes – strong emphasis on onboarding and ethical adoption
- **Enterprise Capable:** Moderate – best for agile teams and pilots
- **Location & Languages:** U.S.-based (SF, Nashville, NYC); English

Ideal For

Innovation, marketing, or operations teams looking to experiment with GPT tools, copilots, or automation without requiring heavy IT infrastructure.

What Their Website Says

- Builds custom GPT-based tools and copilots with a focus on UX, prompt engineering, and automation
- Emphasizes ethical, human-centered AI adoption for creative and business teams
- Offers a tiered delivery model: DIY toolkits, co-designed builds, or custom solutions

Questions to Ask

- Do they have any experience delivering AI solutions for financial services or regulated industries?
- Can they handle unstructured or high-stakes financial data, or is it best for clean inputs and light use cases?
- Are they equipped to support complex advisory or investment-related processes, or better suited to internal productivity tools?

05 | Market Landscape: Profile InData Labs



Overview

InData Labs is a data science and AI consulting company specializing in AI-powered solutions and data analytics. Delivers tailored AI models, predictive analytics, and data engineering services to clients across various industries.

Key Capabilities

- **Industry Focus:** Data science, AI consulting, predictive analytics
- **Custom AI Solutions:** Yes – develops bespoke AI models and analytics tools
- **System Integration:** Yes – integrates AI solutions with existing systems and cloud platforms
- **Handles Messy Data:** Yes – includes data preprocessing and advanced analytics capabilities
- **Training & Change Management:** Some – supports clients with training on implemented solutions
- **Enterprise Capable:** Yes – scalable solutions for businesses of all sizes
- **Location & Languages:** Global clientele; English

Ideal For

Enterprises or mid-size firms seeking technical depth and cost-effective development for AI-powered platforms, models, or products.

What Their Website Says

- Offers custom AI development and predictive analytics across industries, including fintech
- Promotes experience in investment management, portfolio analytics, and AI for customer retention
- Highlights global delivery capability and technical depth in data engineering and AI infrastructure

Questions to Ask

- What direct experience does the team have in wealth management or alternative investments?
- Can they support compliance, documentation, and data governance standards common in financial services?
- What results have they delivered in investment analytics or client retention—and for which types of financial firms?

05 | Market Landscape: Profile Markovate



Overview

Markovate is a development firm specializing in generative AI (GenAI) solutions, creating applications, copilots, and interfaces tailored to industries like healthcare, fintech, SaaS, and retail. The company focuses on delivering scalable, innovative prototypes and production tools that integrate AI with mobile and cloud technologies.

Key Capabilities

- **Industry Focus:** SaaS, healthcare, fintech, retail, startups
- **Custom GenAI:** Yes – builds tailored AI models, chatbots, and copilots
- **System Integration:** Yes – includes APIs, front-end interfaces, and database connectivity
- **Handles Messy Data:** Yes – offers preprocessing and QA tools for data transformation
- **Training & Change Management:** Some – provides client training as part of project delivery
- **Enterprise Capable:** Yes (mid-sized) – suitable for departmental or business-unit scale solutions
- **Location & Languages:** U.S.-based (San Francisco); English

Ideal For

Startups, SMEs, or product teams aiming to rapidly develop and deploy GenAI-powered MVPs (Minimum Viable Products), chatbots, or automation tools at an affordable cost.

What Their Website Says

- Builds GenAI tools (chatbots, copilots) for fintech, healthcare, and SaaS
- Highlights work in portfolio optimization and personalized advice
- Emphasizes speed, integration, and affordability for mid-size clients

Questions to Ask

- Have they worked with regulated firms or wealth platforms?
- How do they handle compliance and advisor oversight?
- What support is offered after deployment?



05 | Market Landscape: Profile Big Consultancies (EY, Deloitte, etc.)

Overview

These global consultancies bring scale, structure, and deep industry expertise to enterprise AI projects. Each firm offers generative AI strategy, deployment, integration, and transformation programs—often partnering with other firms that specialize in AI development and deployment.

Key Capabilities

- **Industry Focus:** Broad – finance, healthcare, public sector, retail, and more
- **Custom GenAI:** Yes – full-stack GenAI planning, tuning, and implementation
- **System Integration:** Yes – deep enterprise IT, ERP, CRM, and cloud integration
- **Handles Messy Data:** Yes – strong data engineering, prep, and governance
- **Training & Change Management:** Yes – full change programs, org design, and upskilling
- **Enterprise Capable:** Yes – built for global, regulated, and complex environments
- **Location & Languages:** Global offices with multilingual delivery teams

Ideal For

Global enterprises, financial institutions, and regulated industries pursuing multi-phase, multi-region GenAI transformations with an emphasis on compliance, scale, and internal adoption.

What Their Website Says

- Deliver end-to-end GenAI programs for enterprise and regulated industries
- Emphasize strategy, compliance, and organization-wide adoption
- Highlight global scale and partnerships with major AI platforms

Questions to Ask

- Will they build and deploy the solution, or just design the roadmap?
- Who from their team has direct experience in AI, wealth management, or alternatives?
- How do they adapt to AI's pace within a complex enterprise culture?

05

Market Landscape: Profile OpenAI (ChatGPT Enterprise)



Overview

OpenAI's enterprise offering provides secure, high-performance access to GPT-4o, with admin controls, privacy assurances, and extended context windows. Designed as a turnkey AI assistant or foundation for custom internal tools.

Key Capabilities

- **Industry Focus:** General-purpose (not verticalized)
- **Custom GenAI:** Yes – custom GPTs & fine-tuning available
- **System Integration:** No – requires client-side or partner-led integration
- **Handles Messy Data:** Partial – depends on prompt design; no preprocessing tools
- **Training & Change Management:** No – self-service; no formal enablement
- **Enterprise Capable:** Yes – SOC2, SSO, admin controls, analytics
- **Location & Languages:** Global delivery; English-first models

Ideal For

Organizations with technical teams seeking direct, secure access to GPT-4o for internal copilots, automation, or chat-based interfaces.

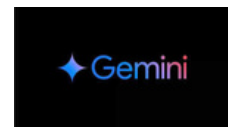
What Their Website Says

- Offers secure, enterprise-grade access to GPT-4o with admin tools and privacy controls
- Enables custom GPTs and assistants for internal use cases
- Promotes partnerships (e.g. Morgan Stanley) to showcase financial applications

Questions to Ask

- Who will design, build, and integrate the solution—internal team or external partner?
- Does OpenAI recommend service providers for deployment and compliance customization?
- Who manages ongoing updates, hosting, and support once the solution is live?

05 | Market Landscape: Profile Google (Gemini / Vertex AI)



Overview

Google's enterprise AI suite includes Gemini models and the Vertex AI platform for building, training, and deploying custom AI agents and applications. Strong integration with Google Cloud and Workspace.

Key Capabilities

- **Industry Focus:** Broad enterprise coverage (finance, health, retail, etc.)
- **Custom GenAI:** Yes – full model tuning, agent building, vector search
- **System Integration:** Yes – native in GCP, Workspace, and APIs
- **Handles Messy Data:** Yes – strong pipeline and ingestion tools
- **Training & Change Management:** Yes – tools and docs for developers & teams
- **Enterprise Capable:** Yes – secure, scalable, full-stack platform
- **Location & Languages:** Global (U.S. HQ); multilingual model access

Ideal For

Enterprises invested in Google Cloud or Workspace looking to build embedded AI apps, copilots, or agent workflows.

What Their Website Says

- Offers Gemini models and Vertex AI for building and deploying custom AI agents
- Deep integration with Google Cloud, Workspace, and enterprise data pipelines
- Emphasizes scalability, security, and full-stack customization

Questions to Ask

- Who will build and manage our AI solution—Google, a partner, or our team?
- How well does the platform integrate with non-GCP systems and hybrid environments?
- What's the path from prototype to production—and who owns it end-to-end?

1. AI Integration with Existing Systems

MCP (Modular Context Protocol) architectures allow firms to route data across systems without rewriting core infrastructure. Embedding AI into their existing processes and tools—Slack, Notion, CRMs, and shared drives.

Examples:

- **Content Marketing Pipeline** – Generates ideas, editorial calendars, and drafts.
- **Compliance Pre-Check** – Flags risky marketing language in real time before compliance regulatory review.
- **Meeting Recap Bot** – Summarizes calls and routes action items to the right system or team.
- **Internal Q&A Assistant** – Answers staff questions using internal policies, HR docs, and IT guides.

2. Open-Source AI Infrastructure

To reduce risk, cost, and reliance on LLM vendors (OpenAI, Anthropic, etc.) firms are deploying their own open source LLMs and vector databases to create private, ownable “firm brains.”

Examples:

- **Internal LLM Deployment** – Host a private open source model (e.g., DeepSeek, Mistral).
- **AI Research Library** – Lets teams search old pitch decks, memos, and strategy notes using vector search and RAG.
- **Multi-Model Routing** – Uses MCP to swap between open models for speed, cost, or security needs.
- **Branding + Tone Engine** – A firm-tuned assistant that enforces voice, tone, and formatting rules across outputs.

3. AI-Powered Product Innovation

Some firms are using GenAI to turn proprietary knowledge, research, or workflows into entirely new products, tools, or services.

Examples:

- **Advisor GPT** – A white-labeled chat assistant trained on your firm’s process, built to support junior advisors or clients.
- **Real-Time Prospect Researcher** – AI-prepped prospect briefings with bios, shared connections, and firm-aligned talking points.
- **Wealth Literacy Engine** – Personalized explainers and educational content tailored to client knowledge gaps and life stages.

07 | Implementation Best Practices

Implementing AI isn't just a technical lift—it's an organizational shift. These five best practices anchor successful rollouts, helping firms move from experimentation to real business impact with clarity and control.

Business Consultation



Start with the problem to solve and tie projects to measurable outcomes.

Team Empowerment



Think enablement, not replacement: AI is a capability multiplier. Human-AI collaboration is the design default.

Data Foundations



Invest in data hygiene and access controls before model deployment.

Scalable Piloting



Pilots are essential, but success means planning beyond the demo with a clear path to integration and scale.

Expectation Management



Avoid internal chaos by communicating clearly and helping manage expectations

08

Beyond the Buzzwords: What's Really at Stake

The wealth management industry is shifting—demographics, client expectations, and technology are all moving at once.

AI is not going to reinvent wealth management. But it will quietly reshape how work gets done—how firms communicate, how insights are delivered, and how relationships are maintained.

This guide is meant to help you think clearly about that shift. Not in abstract terms, but in operational ones: Where does AI fit into your actual business processes? What's worth automating? What isn't? And who can help you build without wasting time or credibility?

**You don't need to become a technologist.
You need a system—and a partner—that understands your practice,
supports your team—but also knows where AI might get in the way.**

Off-the-shelf tools probably won't get you there.

What will is a system that's digital where it should be, human where it matters, and built to fit your firm.

'Customization' used to be code for 'high cost and long timelines'.

Today, with AI, it just means efficient, aligned, and built around how your firm actually operates.

Contact us to learn more: info@puremath.ai



Generative AI might seem like magic,
but it's just Math.

— About

Pure Math.AI guides individuals, teams, and organizations through the AI revolution, providing the essential tools and insights needed to unlock your future potential.

We sit at the heart of technology and business transformation, combining the power of the latest innovations in AI with human expertise to drive real-world innovation. From one-off projects to full-scale business automations and workflows, we're building practical, scalable solutions that help our clients reimagine the way they work.



Pure Math.AI