

The WealthTech Inflection Point

What independent advisors, broker-dealers, and compliance officers reveal about integration, compliance, and AI — and the case for service transformation delivered through agents

A field report built on primary interviews with independent financial advisors and compliance professionals, the 2025 Kitces AdvisorTech Study, and current market data.

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SNAPSHOT

WealthTech is an industry reporting declining user satisfaction scores and dealing with a consolidation wave. In the interest of providing product leaders with on-the-ground intel from your end users about **what they need and want,** we conducted a series of interviews with financial advisors, compliance officers, and broker-dealers.

Executive Summary

This report is on-the-ground recon for the software companies that serve financial professionals. We interviewed independent financial advisors, broker-dealers, and compliance professionals about the daily reality of their tools. Their accounts, cross-referenced against Kitces data and current market research, converge on six recurring themes: integration failure, shallow-but-growing AI adoption, compliance as a pervasive tax, an accelerating consolidation wave, technology quality as a driver of advisor retention, and — underlying all of it — the near-total absence of a structured advisor-discovery function inside most WealthTech companies.

The wealth management industry is increasingly dissatisfied with the technologies they rely on to produce business outcomes. Across the 23 software categories used by the typical wealth management firm, user satisfaction fell in all but three between 2023 and 2025 (Kitces, 2025). The industry is buying more technology and liking it less, indicating a gap between what financial professionals need and what vendors build.

Additionally, a consolidation wave is rolling over the WealthTech industry led by companies like Orion. Traditional preferences for unbundled software solutions are being disrupted by software providers that have successfully identified an opportunity to provide platformized WealthTech solutions that more effectively meet user needs. For product and engineering leaders at mid-market WealthTech companies, this provides an opportunity. The vendors that close the gap — with differentiated AI, tighter integration, and compliance built into the value proposition — will command higher valuations before the consolidation window closes.

Users report dissatisfaction with “shallow” AI implementations that fail to deliver useful results. However, there are examples in the WealthTech market of AI-based products that are lauded by their users because they simplify or accelerate previously time-consuming tasks, especially in compliance workflows.

The most credible way to deliver AI into a regulated, service-heavy environment is not autonomous automation but **service transformation delivered through agents** — a human-in-the-loop architecture in which AI agents retrieve, assemble, and surface role-relevant information to a person who stays in control of the decision. It is the model advisors themselves describe wanting, the model the data supports, and the model ITX has already built in regulated environments including retirement fintech, compliance-driven public-sector AI, and enterprise-scale service operations.

About This Research

This report draws on three sources. First, a set of primary interviews conducted by ITX with practicing independent financial advisors and compliance professionals across broker-dealer, RIA, and private-fund settings — the people who live inside advisor technology every day and whose complaints ultimately land on product teams. Quotes attributed to named individuals appear with their permission. Second, *The Kitces Report, Volume 1, 2025: The Technology That Independent Financial Advisors Actually Use And Like,* based on survey data gathered from March through April 2025, which remains the most comprehensive independent study of the advisor tech stack. Third, current 2025–2026 market and regulatory data drawn from public sources, cited throughout and listed at the end.

Key Definitions

WealthTech — The constellation of technology solutions used to facilitate the work of financial professionals, including financial advisors, broker-dealers, CPAs, TPAs, and compliance officers. A sub-category of FinTech, it can itself be broken down into subcategories such as AdvisorTech.

Platformization — acquiring and then rebranding independent products as modules of one integrated whole.

Corpus — the complete collection of external data, documents, and reference materials that a Retrieval-Augmented-Generation (RAG) system searches through to provide accurate, grounded context to a Large Language Model (LLM).

Introduction:
The State of WealthTech in 2026

The WealthTech market is large and growing fast. Independent analysts place the global WealthTech solutions market at roughly $8–9 billion in 2026, growing 15%+ annually, with North America the largest region (Mordor Intelligence, 2026). That growth has produced an explosion of choice: the Kitces (2025) study catalogs 45 distinct business functions for which advisors now use software.

Abundance has not produced satisfaction. Even the least technologically sophisticated firms use 10 tools to support 16 functions — evidence of how essential these systems have become — yet satisfaction is declining across almost the entire landscape. Of the 23 categories Kitces (2025) could compare directly between its 2023 and 2025 reports, ratings fell in all but three. The steepest drops came in business-development software: website platforms, digital marketing, and proposal generation. But the decline extended broadly across operations, investment, and planning functions alike

> *The end result is an industry more reliant on technology than ever, yet increasingly dissatisfied with the solutions they feel forced into.*
>
> **— The Kitces Report, Volume 1, 2025**

We embarked on this research in service of the product, engineering, and experience leaders at WealthTech companies — the people deciding what to build next, and under what constraints — with the hope that it illuminates on-the-ground realities of the end users of your products and their frustrations. Here's what we learned from your end-users.

20 of 23

comparable software categories saw satisfaction decline.

More technology. Less satisfaction.

WealthTech is adding more software, while user satisfaction keeps slipping across most comparable categories.



The Consolidation Wave:
Both Opportunity and Threat for Mid-Market Vendors

All interview subjects described a historical preference for unbundled, standalone WealthTech — and all acknowledged the market was shifting. Fueled by private-equity capital, the WealthTech market is consolidating into platforms. And one platform was mentioned more than any other in our interviews: Orion.

Orion has rolled up CRM, performance reporting, compliance, and onboarding WealthTech tools into a single portfolio. Backed by TA Associates, its majority owner since 2015, and joined by Genstar Capital in 2020, Orion has spent the past five years buying its way across the advisor tech stack and folding each acquisition into a single platform (TA Associates, n.d.). This is **platformization**: acquiring and then rebranding independent products as modules of one integrated whole.

> *Orion bought Redtail, they bought performance software, they bought onboarding tools — they're basically buying up all these smaller independent deliverables and folding it into one portfolio so it's a one-and-done.*
>
> **— Mark Colgan, Independent Financial Advisor, JW Cole**

Orion acquisitions by year, 2020-2025

YEAR	ACQUISITION	WHAT IT ADDED TO THE PLATFORM
2020	Brinker Capital	A turnkey asset management platform (~$24.5B AUM); the combined firm crossed 10,000+ active advisors
2021	BasisCode Compliance	Compliance management and trade surveillance (rebranded to Orion Compliance)
2021	HiddenLevers	Portfolio risk and stress-testing (rebranded Orion Risk Intelligence)
2022	Redtail Technology	The leading independent advisor CRM; its founder became Orion's President of CRM
2023	Platform integration	The "Moonshot": CRM, compliance, and risk unified into one Orion Advisor Platform
2025	Summit Wealth Systems	Advisor portfolio and reporting technology, extending the platform further

Note. *Compiled from Orion Advisor Solutions press releases (2021–2025) and Institutional Investor (2022).*

Once advisors experience CRM, planning, compliance, and reporting that share one data model and one login, every standalone tool is measured against that standard. MassMutual's 2025 launch of an all-in-one platform built with Orion shows how fast that expectation is spreading from independent RIAs into the broker-dealer channel (MassMutual, 2025).

Today, Orion serves more than 25,000 advisory firms and supports $6.6 trillion in assets under administration (Orion Advisor Solutions, 2026). However, platformization does not automatically deliver the seamlessness it promises. Having assembled its platform through acquisition, Orion spent 2024 pulling back on deals to focus on integration. As the company's leadership has acknowledged, integration remains the number one issue advisors face with their technology (WealthManagement, 2024).

That leaves mid-market vendors two viable futures. A vendor can survive independently by becoming so differentiated and well-integrated that advisors refuse to give it up, even in a platform world — or it can maximize its value as an acquisition target by becoming the kind of clean, modern, easily-integrated asset a platform wants to buy. Either path requires serious investment now, while the window is open: those who move enter consolidation as higher-valuation assets; those who wait negotiate from weakness. That starts with integration.

Two Paths Forward

for Mid-Market Vendors

01

Stay Independent

- Become differentiated
- Integrate deeply
- Be hard to replace

02

Become Acquisition-Ready

- Become modern
- Keep data and architecture clean
- Be easy to integrate or buy

Both paths begin with integration.

Integration Is the Number One Pain, and the Number One Purchase Driver

Poor integration between tools is the primary pain point of the end user. Every interviewee described broken data flows between tools they had specifically chosen to work together.

There is a disconnect many product teams miss: users and WealthTech companies define integration differently. When the users we interviewed talked about integration, they express a desire for a seamless experience where data entered in one record, or a document uploaded for a particular client, is disseminated across their tool ecosystem. In contrast, product people tend to think about integrations in terms of API and batch processing workflows.

HOW END USERS DEFINE INTEGRATION	HOW PRODUCT TEAMS DEFINE INTEGRATION
A desire for a seamless experience where data entered in one record, or a document uploaded for a particular client, is disseminated across their tool ecosystem.	APIs, 360 or 180 integration, or batch processing workflows.

Creating an API does not produce an integrated experience — at least not the one WealthTech users describe wanting. They want a robust document-sharing ecosystem that's as frictionless as possible . Of course, considerations must be made about what is permitted in a compliance-heavy industry like WealthTech:

1. **SEC Regulation S-P** incentivizes data minimization and strict access controls to remain compliant. Every module with document sharing is another area to monitor.
2. **Gramm-Leach-Bliley (GLBA)** requirements may prevent document sharing if your product modules are legally distinct entities.
3. **Write Once, Read Many (WORM)** requirements mean that synced documents must trace back to an immutable original, and any edits must be tracked precisely.
4. **Supervision and communications rules (FINRA 3110 / 2210)** may create situations where a document review needs to be triggered when it passes into a product module visible to a customer.

In one case, an interviewee mentioned they had spent months, and eventually hired a consultant, to repair a broken connection between Wealthbox CRM, and his ScheduleOnce booking tool — a chain that should have been seamless. Steve Wershing, a tax-focused advisor who has built his entire practice around

specialized software, put the structural problem plainly: advisors deliberately avoid "jack of all trades" suites because they are weak in some areas, so they buy specialized tools — which then don't talk to each other.

> *The biggest pain point for an advisor firm is that there's a lack of good integration between tools. Information does not seamlessly flow.*
>
> **— Steve Wershing, Independent Financial Advisor**

Steve described the tracking of required minimum distributions across custodians as a manual ordeal: calling each firm, requesting exports in incompatible formats, and normalizing everything by hand into a spreadsheet. "If we could invent a way of tracking RMDs across financial products," he said, **"that'd be a multi-million-dollar idea."** Michael Palumbos described a five-month paper onboarding process for a single account application, and 76-page documents to open new accounts.

To deliver users' desires for better integration, WealthTech companies need to pursue bold approaches. In a 2022 interview, Orion CEO Eric Clarke discussed some of the measures they were taking to reduce friction on their platform. Eric identified Amazon Redshift as the keystone of their integration efforts (Orion Advisor Solutions, n.d.). Redshift is a cloud-based data warehousing product, built on AWS, that permitted Orion to knit their products together. A document uploaded to their compliance workflow will appear on that customer's CRM record, because both modules pull from a singular data store (satisfying WORM requirements). This foundational work to tackle the underlying data warehousing structure is difficult and expensive, but necessary to create a truly integrated WealthTech platform.

We recommend that mid-market vendors targeting acquisition begin laying groundwork for future platform integration. Mapping data stores, migrating to cloud platforms, and cleaning data — anything that might reduce the cost of acquisition and integration — will help to make your product an appealing acquisition target.

Good data structure is also a prerequisite to AI implementations that deliver value. AI projects can be accomplished most cost-effectively (and maximize the chances of providing accurate results) when their corpus (the body of data the model pulls from to develop a prompt response) is well structured, performant, and free of redundancies and inaccuracies.

AI Adoption Is Real but Shallow:
Advisors Want a Human in the Loop

Interest in AI is high; deployment is thin and cautious. Kitces (2025) finds advisors most commonly use AI to review client documents (20%), while more than half express interest in using it for data gathering, plan preparation, and improving investment outcomes. Adoption is accelerating quickly — Charles Schwab's 2026 RIA Benchmarking Study reports 83% of firms now use AI in some capacity, and AI notetakers have reached roughly 40% adoption — but the depth of use remains modest.

The most important finding for product teams is about intent, not adoption. Advisors do not want AI to take the wheel. Kitces (2025) is unambiguous: 57% want AI to expedite tasks and 15% to help initiate them, while just 28% want full automation. Products marketed as hands-off autonomy are misaligned with what buyers want.

Advisors described this preference concretely. Mark Colgan uses Zocks for meeting notes and has built more than a dozen custom GPTs to elevate his services. Ryan Visniski, a compliance officer, uses sandboxed Claude Enterprise and ChatGPT to summarize regulatory developments, but cannot put sensitive client data into any external model.

There are emerging models for AI-based WealthTech products that deliver value. Michael Palumbos repeatedly praised the model pioneered by the estate-planning tool Vanilla, which pairs AI-generated estate documents and summaries with review by its network of attorneys before the advisor delivers them (Vanilla, 2025). This product accelerates compliance review by automating some portion of the review process, flagging problem areas, and guaranteeing that an attorney will give the final sign-off. In an industry with a lot of boilerplate documentation, a financial advisor can more rapidly deliver on their promise to their clients. Vanilla's pricing model has changed recently to an "AI assistance as a service" model with pricing tiers starting at $99.00 per month; moving away from a per-review pricing model (Vanilla, n.d.).

> *That hybrid [attorney review plus AI model offered by Vanilla] is ten times better than one hundred percent fully-only AI.*
>
> **— Michael Palumbos, Independent Financial Advisor**

What Advisors Want AI to Do

57% | **expedite tasks**
Speed up existing processes and save time.

15% | **initiate tasks**
Surface next best actions and start the work.

28% | **full automation**
End-to-end execution with minimal human input.

Advisors want acceleration, not autonomy.

AI is valued most for making advisors faster and more effective—not for replacing their judgment.

 **83%** use AI in some capacity.

Compliance is Taxing, But Can Be Turned to Your Advantage

Every category of WealthTech carries compliance overhead. Marketing materials, text messages, social posts, client data in LLMs, and new-software approvals all pass through review. The financial cost of getting it wrong is enormous: since December 2021, the SEC has fined more than 100 firms over $2.2 billion for off-channel-communications and recordkeeping failures — a figure that exceeds $3.5 billion once parallel CFTC and FINRA actions are included (Greenberg Traurig, 2024). And while the SEC has since deprioritized these cases under new leadership in 2025, FINRA has continued enforcement and the underlying recordkeeping obligations remain unchanged (Sidley Austin, 2026; Corporate Compliance Insights, 2025). Morgan Stanley alone paid $200 million in 2022 and now levies internal fines of up to $1 million on its own staff to police the problem (Bloomberg Law, 2023).

Advisors and compliance officers bear the weight of maintaining compliance and consider it burdensome. Ryan Visniski described the pain of expensive, hard-to-exit archiving tools, the five-year retention requirement for all approved communications, and the drudgery of pulling data from many platforms — each with its own login and two-factor prompt — to assemble SEC filings. Michael Palumbos flagged text-message compliance tools such as MyRepChat as widely disliked but effectively mandatory.

WealthTech product companies that dedicate resources to crafting compliant platforms with intuitive user experiences stand to gain market share. Because compliant software is structurally expensive to build, it presents a strategic opportunity for WealthTech product leaders willing to invest. By investing in a strongly compliant product, WealthTech product companies can dig themselves a deep protective moat around their business, while simultaneously fulfilling their users' most important needs. For example, the wealth management platform BlueLeaf was mentioned positively in interviews as a product with solid compliance workflows that would make it difficult to justify moving to another vendor.

> *That hybrid [attorney review plus AI model offered by Vanilla] is ten times better than one hundred percent fully-only AI.*
>
> **— Michael Palumbos, Independent Financial Advisor**

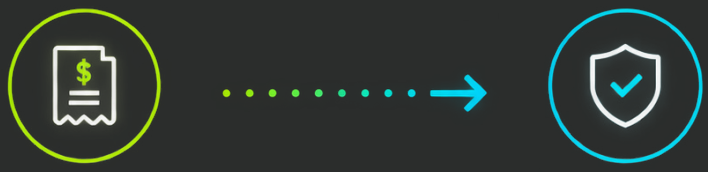
COMPLIANCE

$2.2B+

SEC fines since Dec. 2021

$3.5B+

including parallel actions



Compliance as Tax

Cost center.
Drains resources.

Compliance as Moat

Builds trust.
Compounds advantage.

> In WealthTech, compliance can shift from burden to competitive **advantage.**

Technology Quality Is an Advisor-Retention and Recruiting Lever

Technology is the direct driver of the business metric broker-dealers care about most: advisor retention and recruitment. Mark Colgan left Commonwealth in part because its technology stagnated. Steve Wershing, by contrast, has built his firm's entire workflow around his current tools and will not switch "unless something is radically better" — quality cuts both ways, in that vendors who commit to quality will have an easier time retaining clients.

"Technology quality" can be broken down into three parts: how the software feels to use, how well its data is built, and how fast it runs.

An intuitive user experience may be invisible, but that does not mean it isn't appreciated by end users. Mark Colgan praises his marketing platform, FMG, because "everything is automated" and "it flows really smoothly." Steve called his broker-dealer's software "hideous," and blamed a vendor that "had no idea what things were like in the field." We heard from some interview respondents that they felt that, because software vendors may sell through broker-dealers, their end user experience remains of secondary importance compared to factors the broker-dealers value. Kitces (2025) bears this out: the sharpest satisfaction drops between 2023 and 2025 hit advisor-facing tools — websites, digital marketing, and proposal generation.

What's truly invisible to the end user is the data layer. However, much like the user experience, it is also felt. Steve's required-minimum-distribution routine — calling each custodian, collecting exports in different formats, normalizing by hand — is symptomatic of a data problem. What he wants underneath is clean data feeds. Michael Palumbos described trying to pull client data "from the estate planning software, from e-money, from the tax software" and "marry that up" into one deliverable, which "doesn't happen." Kitces (2025) now ranks advisor data warehousing among the functions advisors most want. Orion's investment into cloud storage technology to underpin its integration efforts is further evidence to support the importance of investing in your product's data layer.

Some software products perform slowly or are resource hogs — or both. Advisors don't report that software is slow; they just stop using it. Mark Colgan writes off one incumbent product as "outdated," and Steve Wershing wants "smoothness and accuracy."

Good technology returns time. For this reason, high-quality technology creates value. Advisors at some firms report saving one to three hours per day, with roughly 80% reinvesting it in client-facing work — deepening existing relationships or prospecting new business (BlackRock, 2026).

> *Technology has been as much of a headache as a blessing. With the right products, AI integration, and a consultant that can lead for me, I think I can make that shift within 12 to 24 months in such a way that it's going to be a significant benefit. And I think the advisors that aren't embracing this are going to be extinct.*
>
> **— Mark Colgan, Independent Financial Advisor, JW Cole**

The Advisor Voice Is the Overlooked Input in the Product Organization

The deepest theme is also the least visible. Most WealthTech companies do not have a structured way to learn what advisors need or want. Complaints arrive as customer-service tickets, not as synthesized insight — and rarely travel far enough up the organization to shape a roadmap. As one FinTech veteran told ITX, financial-services companies have a long history of playing defense: "if it ain't broke, why fix it?" They hear complaints; they seldom convert them into differentiation.

Where the discipline exists, it works. Michael Palumbos singled out the SVP of Advisor Experience model at Osaic — a senior leader whose job is to go into the field, gather advisor pain points, and feed them directly to engineering.

> *She would go out and interview all of the top advisors — what are you dealing with, what's going on, give me the priority. Then she'd go back to the tech team, and things were getting cleaned up really fast, because the tech team knew exactly what they were looking for.*
>
> **— Michael Palumbos, on the advisor-experience function every WealthTech company needs**

Steve described the opposite: a vendor his broker-dealer engaged that "had no idea what things were like in the field." The lesson for product leaders is that structured advisor discovery is not overhead — it is the cheapest available source of durable competitive advantage, and almost nobody is doing it well.

The Path Forward:
Service Transformation Delivered Through Agents

The advisors quoted throughout this report are the end users who surface the pain. The people who can act on it are the product and technology leaders at the software companies advisors depend on — and across the research, they share a common bind. These companies are large enough to have a defined roadmap but not large enough to fully staff it, and they are being asked to ship regulated, AI-enabled features their internal teams have never built before. The six themes tell them *what* to build. The harder question is how to build it in a way compliance officers will approve and advisors will adopt.

The evidence points to a specific answer. Advisors want AI that expedites work under human control; compliance requires that outputs be reviewable and data stay contained; and the biggest wins are in stitching together information trapped across disconnected systems. The architecture that satisfies all three at once is not autonomous automation. **It is service transformation delivered through agents:** AI agents that retrieve, normalize, and assemble role-relevant information from many back-end systems and surface it to a human who stays in command of the decision. Many interviews referred to real-world agent implementations: recommendation engines, review workflows, and service agents. The sections below map how to pursue it.

The concierge model

In service-concierge architecture, line-of-business agents each connect to a specific system — CRM, planning, custodial data, compliance records — and retrieve what they know, while a coordinating agent assembles those pieces and surfaces a single, real-time, role-relevant view to a human on a live interaction. The human still talks to the client, still exercises judgment, still owns the outcome; the agents eliminate the swivel-chair work of hunting across logins, exports, and incompatible formats that advisors described as their number-one pain.

This is precisely the tool Steve Wershing wished for aloud: an AI "that could make calls to technology providers and ask questions on your behalf" and pull disparate systems together. It is the RMD-normalization engine, the five-month onboarding compressed, the SEC-filing data assembled without fifteen separate two-factor prompts. And because a person reviews and approves, it is the human-in-the-loop model advisors and compliance officers independently asked for.

Human-in-the-loop your users want

Outputs are surfaced for human review rather than acted on autonomously, creating an audit and approval point. Sensitive client data can remain inside the client's environment — the sandboxed, data-resident constraint Ryan Visniski and others treat as non-negotiable — because agents retrieve and present rather than exfiltrate to an external model. In the review step, the AI does the assembly and drafting; the qualified human does the approving.

Staged implementation

Many AI initiatives fail, primarily because organizations are not ready to implement AI (for example, their data warehousing may have a flawed structure or may simply not exist). Or, they can be overambitious and jump to implementation too quickly. In contrast, a sensible engagement ladder looks like this:

STAGE	WHAT IT DELIVERS
1 · Strategy & ROI workshop	Assess organizational AI readiness. Map current versus future service flow; build the business case and payback model
2 · Foundation starter	AI Data-readiness analysis and architecture assessment
3 · Proof of concept	A working demonstration on the client's own data
4 · Production build	Full delivery, integrated with existing ERP and CRM systems

Why ITX

ITX has built regulated, AI-enabled, service-heavy systems in exactly the conditions this market demands. Our work spans compliance-aware AI in the public sector, regulated retirement fintech, and enterprise-scale service operations where line-of-business agents feed a coordinating agent that surfaces real-time information to human representatives. We have shipped systems built under real regulatory and data-residency constraints.

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