

Wealth Management Technology Firms Announce AI & Automation Summit for Financial Advisors

An AI-focused virtual summit for growth-minded financial advisors and wealth managers

RIVERSIDE, CA, USA, June 27, 2023 /EINPresswire.com/ -- The [AI](#) and [Automation](#) Summit for Financial Advisors, a one-of-a-kind event featuring innovative [technology](#) firms, is set to take



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place on July 12th at 2 pm ET. Craig Iskowitz, CEO of Ezra Group, will lead the panel. The summit will showcase the latest advances in artificial intelligence (AI) and automation and how financial advisors can leverage these technologies in their practice.

The summit will feature four leading technology firms, Redtail Technologies, FP Alpha, Pulse360, and VRGL. They will showcase their technology and provide insights into how AI can transform the financial advisor's workflow.

Advisors will learn new ways to use AI to streamline communications, analyze data more effectively, and make more informed investment decisions.

In addition, the summit will kick off with a 25-minute panel discussion on the state of AI, starting with an explanation of the basics. This is the perfect opportunity for financial advisors to learn from industry experts and stay ahead of the curve in this fast-paced field.

The AI and Automation Summit for Financial Advisors is open to all growth-minded financial advisors and wealth managers, whether seasoned professionals or starting out. The event promises to offer a unique opportunity to explore the latest trends in AI and automation.

"AI and automation are changing the landscape of financial advising, and we're excited to showcase the latest innovations in this field," said Anand Sheth, CEO of Pulse360 and event organizer. "We believe this summit will help financial advisors learn how to use the latest technology to serve their clients better and enhance their practice."

Registration for the AI and Automation Summit for Financial Advisors is now open. To register and learn more about the event, visit <https://pulse360.com/ai-automation>.

About Pulse360

Pulse360, a 2021 Wealthmanagement.com Industry Awards Finalist, was created to make financial advisors at least 50% more productive. Our remote-ready SaaS suite can make every aspect of fiduciary meeting prep and documentation 10X more efficient. The Company was founded in 2019 by Anand Sheth and James Hill. The Company is headquartered in Riverside, CA.

About FP Alpha

Founded by financial planner and industry leader, Andrew Altfest, CFP[®], FP Alpha is an AI-driven holistic comprehensive planning solution that helps advisors identify actionable recommendations to clients, in a scalable, intelligent, and cost-efficient manner. FP Alpha is designed to integrate seamlessly into the many stages of the financial planning process and is complementary to the advisor's current financial planning software, starting where they stop. By leveraging AI learning and subject matter experts across 16 financial planning disciplines, including tax, estate and insurance, this innovative tool allows advisors to uncover new planning opportunities and provide clients with more holistic advice. For more information, please visit: <https://fpalpha.com>. Patent Pending.

About VRGL

VRGL provides institutional-grade analytics and automated data extraction to empower wealth management firms to accelerate the Client Acquisition, Proposal Management and Retention process ("CAPM & R"). By giving clients a complete view of their consolidated investment picture and what a transition would look like, VRGL enables advisors to quickly demonstrate how and why they add value. This methodology presented at the front end of advisor engagement decreases the time and cost associated with lengthy prospecting so advisors can accelerate time to new revenue and retention of existing AUM. Founded by pioneers of the institutional wealth management industry, VRGL's technology lets advisors seamlessly aggregate all client investment data and provides a no-touch analytics package and proposals allowing an advisor to contextualize their own investment offerings and advice.. For questions or more information, email info@vrglwealth.com or visit the website www.vrglwealth.com.

About Redtail

Founded in 2003, Redtail is a leading provider of web-based Client Relationship Management (CRM), compliant text messaging solutions (Redtail Speak), paperless office, and email archiving solutions in the financial services industry. The company is dedicated to helping advisors efficiently grow their firms by providing them with the core technologies that drive their day-to-day operations, offering low cost and easy to implement applications and integrating with many of the industry's most widely used applications. As a pioneer in the financial technology industry, Redtail is committed to providing advisors exceptional customer service and strives to contribute in meaningful ways to its local communities in California, Arizona, and Georgia. For more information, visit <https://corporate.redtailtechnology.com/>.

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