

YourStake launches Advisor Core, a new portfolio analysis and proposal generation tool for advisors

Advisor Core is a new suite of tools that allows for statement pdf extraction in minutes with full portfolio analysis and client-ready proposals powered by AI

NEW YORK, NY, UNITED STATES, September 11, 2023 /EINPresswire.com/ -- YourStake, the



We have developed our new tools in such a way that it learns to not make the same mistake twice. Advisor Core clients will see consistent improvement in the platform the more they use it."

*Gabe Rissman, Co-Founder,
and President*

financial advisor platform for personalization, today announces the launch of [Advisor Core](#), The 'easy button' for client proposals: upload any brokerage statement pdfs and get a comprehensive financial analysis and client proposal presentation in less than 3 minutes.

Many Advisors often analyze prospective clients' existing portfolios and compare them to ideal or own model portfolios as a way to sell their own expertise and insight, but this process can take up to a dozen hours per prospect. This pain comes when an advisor or paraplanner is tasked to manually transcribe hundreds of holdings from an account statement, often leading to re-checks and

errors from hand transcription processes, pore-over analysis calculations, and then building a compelling presentation.

Advisor Core changes this process by allowing Advisors or paraplanners to instantly drop any account statement PDFs into the software and receive a comprehensive analysis of the portfolio across key portfolio tenets like Values-Alignment, Risk, Fees, and Sector Diversification, in less time than it takes to brush their teeth. Easily export an on-brand, editable client presentation with AI-driven insights to help share your value with the prospect.

"YourStake has always been a platform focused on personalization. First starting with solving issues with ESG Data complexity, to broadening to portfolio values alignment, we're now able to help bring more transparency and clarity to all levels of personalization from fee and risk management to sector diversification and more. We're now excited to offer that to more advisors than ever before through Advisor Core," remarked Gabe Rissman, co-founder and president of YourStake. " We endeavor to leverage AI technology to develop faster tools and improve

accuracy. We have developed our new tools in such a way that it learns to not make the same mistake twice. Advisor Core clients will see consistent improvement in the platform the more they use it in their practice.”

For advisors just starting out, this toolset can help them become competitive with larger firms that have paraplanners. Additionally, for larger firms, Advisor Core cuts down time on low-value tasks to allow paraplanners to help advisors in more unique ways.

Our software makes this possible through the following capabilities:

- Instant Statement Transcription: Let the power of AI transcribe any PDF into an Excel file almost instantly.
- Full Portfolio Analysis: Whether a quarterly check-in or prospect analysis, get an analysis across key portfolio performance indicators against a set benchmark or selected portfolio.
- Chat-With-Portfolio: Access to your own AI-paraplanner, ready to answer any question. Wonder why Fees are so high? It will tell you what holdings are causing this and offer ways to fix it.
- White-labeled presentation: Easily incorporate our presentations into your next client meeting. Toggle each and every data point and chart included to fit individual needs.

Advisor Core can be used as a standalone product starting at \$3,000 a year. Previously developed tools; now referred to as Values Hub, can also be bundled within our tiered subscription offering.

Advisors can get started using Advisor Core now, by purchasing through our pricing page at: <https://www.yourstake.org/product-features/pricing>

“Advisor Core is another statement that we’re focused on helping Advisors do their jobs better and faster through becoming AI-empowered and finding safe and repeatable processes to use AI without the complexity,” Patrick Reed, co-founder and CEO of YourStake said. “Our team sees the disruption AI is bringing to fintech and we aim to be leaders in unlocking the potential of it and make it accessible for Advisors to access.”

YourStake sees that the next frontier of Advice is personal and our tools are all catered at offering a unique position for practices of all sizes. For more information please visit: www.yourstake.org/advisor-core.

Jack Casady

YourStake

jack@Yourstake.org

Visit us on social media:

[Twitter](#)
[LinkedIn](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/654403738>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2023 Newsmatics Inc. All Right Reserved.