

# Sora Finance Unveils New Product to Help Advisors Turbocharge Client Acquisition

*Sora Finance launched its new prospective client liability analyzer product today at Nitrogen's Fearless Investing Summit.*

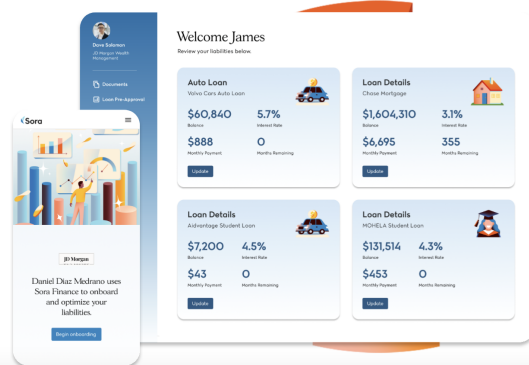
SAN FRANCISCO, CALIFORNIA, USA, October 2, 2023 /EINPresswire.com/ -- [Sora Finance](#), a leading wealthtech startup, is excited to introduce its latest innovative product today to support financial advisors in growing their practices. The Prospective Client Debt Analyzer (PCDA) product is positioned to transform the manner in which financial advisors qualify and convert clients, and boost Assets Under Management (AUM).

[Sora's](#) software solution empowers advisors to engage with clients on all aspects of their consumer and commercial liabilities. Whether clients have a specific lending need or advisors want to proactively monitor and optimize existing debt, Sora acts as an outsourced credit management arm enabling liability optimization with minimal effort. Sora's core product enables independent advisors to offer current clients a private banking-style experience, and with Sora's launch of the PCDA, advisors can now market that experience to potential clients.

Financial advisors adopting the PCDA will experience an enhanced competitive positioning. With auto-generated data-driven insights and tailored proposals, advisors can clearly demonstrate their differentiated value proposition while also understanding their prospective clients'

## Liability Analyzer for Prospective Clients

With Sora's Prospective Client Debt Analyzer, you can qualify and convert more clients to grow your book. Copy a link to put in your email signature, send an email or download a QR code to put in your next presentation - the options are limitless. Unlimited client onboards are included with your subscription to Sora.

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Sora's new Prospective Client Debt Analyzer enables advisors to qualify and convert new clients through liability optimization.



Sora Finance is a leading wealthtech startup providing liability planning as a service to financial advisors and the wealth management community.



I'm super excited about the introduction of the Prospective Client Debt Analyzer. In the ever-evolving landscape of financial advice and wealth management, unique tools like the PCDA are instrumental."

*Siddhartha Oza, Co-Founder/CEO, Sora Finance*

underlying assets (e.g., homes, auto, business). The utility of the PCDA is expected to not only simplify the client acquisition process but also reinforce the foundation of trust in advisor-client engagements.

Siddhartha Oza, Co-founder and Co-CEO of Sora Finance:  
"I'm super excited about the introduction of the Prospective Client Debt Analyzer. In the ever-evolving landscape of financial advice and wealth management, unique tools like the PCDA are instrumental. By identifying latent opportunities across the clients full balance sheet, we offer a clear advantage, enabling advisors to differentiate themselves in a saturated market. The PCDA has the capacity to distill intricate liability data into

coherent, actionable insights, presenting a clear value proposition to potential clients."

How it works:

- Efficient Onboarding: The PCDA offers a streamlined approach, allowing prospective clients to onboard via a single link, completing the process in a brief 30 seconds.
- Comprehensive Analysis: Post onboarding, the PCDA harnesses sophisticated algorithms to produce a meticulous liability portfolio analysis.
- Opportunity Identification: Leveraging advanced analytics and a pool of lender partners, the tool brings forth potential savings and optimization opportunities that may have traditionally been overlooked.
- Proposal Generation: Sora utilizes artificial intelligence to automatically generate a proposal for advisors to take to prospective clients in a second meeting.

Sora is built to support financial advisors and planners in helping grow their clients' net worth. While financial advisors have historically focused on the assets side of their client's balance sheet, savvy advisors have recognized the criticality of liability planning. By showcasing that value up front with potential clients, advisors now have the ability to further turbocharge the growth of their practice.

About Sora Finance:

Sora Finance is based in San Francisco and provides liability planning and optimization as a service, enabling advisors to grow clients' net worth by managing across the full balance sheet. Founded in November 2021, Sora now partners with 250+ advisory firms and actively manages more than \$1 billion in client liabilities. The launch of products such as the PCDA cements Sora's position at the forefront of wealth technology evolution. Sora provides credit management in all 50 markets in the United States and covers over 150 types of consumer and commercial or small business loans. For more information visit [sorafinance.com](https://sorafinance.com).

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