

# Couplr AI Unveils Revolutionary Solution to Tackle the Orphaned Client Account Challenge

*The Great Way to Match Financial Advisors and Orphaned Clients*

USA, March 12, 2024

/EINPresswire.com/ -- Today, [Couplr AI](#) is proud to announce the launch of its groundbreaking solution designed to address the escalating challenge of [orphaned accounts](#) in wealth management. As the industry grapples with the complexities of managing these neglected accounts, Couplr

offers a scalable and efficient solution that will transform the landscape for firms and orphaned clients alike.



Orphaned accounts emerge when clients become incapacitated, pass away, or simply lose contact with their financial advisors, often due to the high attrition rate within the industry. This phenomenon poses significant challenges, including regulatory scrutiny, potential lawsuits, and financial losses for wealth management firms. Orphaned accounts, long recognized as a latent risk within the financial services industry, have come under increased scrutiny from regulatory bodies.

Recognizing the severity of the problem, Couplr has introduced a solution that seamlessly integrates into existing client-facing platforms. This solution empowers clients by providing a tool to match them with the right advisors for their needs at the existing firm, whether through logging into their account, receiving a proactive email, or engaging with a direct mail campaign. This approach not only addresses the immediate need for reconnection but also provides an opportunity for wealth management firms to help next-gen advisors grow their businesses by properly matching them up with orphaned clients in need.

"Couplr's mission is to redefine how wealth management firms manage and engage with their orphaned clients. Our solution is designed to be both scalable and efficient, ensuring that every orphaned client has the opportunity to be matched with the right advisor for them to service their needs but also on a human level," said [Derek Notman](#), Founder & CEO of Couplr AI. "We

believe that technology can bridge the gap between orphaned clients and financial advisors, enhancing the human connection while creating a more inclusive and engaging financial landscape."

The adoption of Couplr's technology signifies a pivotal step towards mitigating the risks associated with orphan accounts. By providing a path for reconnection, Couplr not only helps firms comply with regulatory expectations but also enhances the overall client experience and provides an opportunity for them to help next-gen advisors grow their business.

#### About Couplr

The Couplr AI fintech client acquisition solution was specifically built for financial companies and their financial advisors. Couplr is a byproduct of frustration, first hand experience, need, potential, data science, and the human connection. Financial advisors and the companies they represent want to help as many clients as possible, but with up to 90% of advisors failing in the first three years this is a constant challenge, yet also a huge opportunity.

#### Why Couplr?

After 18+ years in the financial services industry as an advisor, founder Derek Notman saw one pivotal issue: a lack of empathy and trust in professional financial relationships, especially for people looking to hire a financial advisor. In other words, lead generation was broken. Knowing that human connection was foundational to success, Derek started the journey to find a solution that truly works. A smart fintech solution matching clients and financial advisors. The result feels magical, but are based on financial psychology, behavioral finance, and math.

For more information about Couplr and its solution for orphaned clients, please visit [www.couplr.ai](http://www.couplr.ai).

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