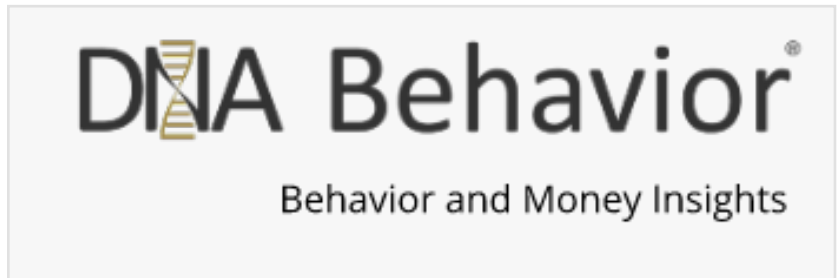


Financial Planning Names DNA Behavior as an Innovation Award Winner

This award highlights DNA Behavior's groundbreaking AI solutions for the wealth management industry.



ATLANTA, GA, UNITED STATES,
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EINPresswire.com/ -- DNA Behavior, a

leading provider of behavioral technology solutions, has been named one of nine winners of Financial Planning's inaugural Innovation Awards. Financial Planning, Arizent's premier resource for wealth management professionals, launched the awards to celebrate the advancements in AI and technology that are reshaping the financial advisory space. DNA Behavior is recognized for its cutting-edge AI Digital Scan, which enhances client and employee engagement through behavioral insights.



We have a deep commitment to transforming how organizations connect with the people who matter most—their employees and clients."

Hugh Massie, Chairman and Founder, DNA Behavior

Five technology firms and four wealth management firms were selected for their notable contributions. Innovator of the Year honorees from each category will be recognized at Financial Planning's ADVISE AI Conference on October 9-10, 2024, in Las Vegas, Nevada. DNA Behavior will be presented with the "Innovation in Client Onboarding Technology" award at that time.

"We recognized the significance of AI for the wealth

management industry immediately," says Brian Wallheimer, Editor-in-Chief at Financial Planning. "Since then, our goal has been to shine a light on the ways financial advisors can leverage this technology to scale their businesses and streamline operations, as well as connect with their clients to help them achieve their financial needs. Now we're recognizing companies that are taking big steps toward bringing that technology into the industry or implementing it in forward-looking ways. They are true innovators."

Behavior's AI Digital Scan

DNA Behavior's award-winning Digital Scan is a unique behavioral forecasting tool powered by generative AI. The tool enables organizations to predict client preferences and behaviors from their digital footprint before any interaction occurs. By understanding each client's unique needs

from the first touchpoint, businesses can create more personalized, efficient, and meaningful client experiences.

“We have a deep commitment to transforming how organizations connect with the people who matter most— their employees and clients. Winning this award for AI Innovation is a testament to our aspirations over the last 20 years to help the financial planning industry be the best it can be,” says Hugh Massie, Chairman and Founder of DNA Behavior.

Revolutionizing Client Engagement

The AI Digital Scan has changed the game when it comes to relating to clients. The system can instantly enrich any contact list with behavioral data, allowing the client experience to be more aligned with their unique style and needs. This gives financial advisors a simple way to save time, increase client engagement, improve outcomes, and earn more referrals.

Attesting to the significance of this newly developed solution, Massie says, “To succeed with the AI Digital Scan, we have been prepared to realign our whole business model which was originally anchored to the active completion of our psychometric questionnaire as a first step. Now, the first step is the AI Digital Scan.”

About DNA Behavior

Since 2001, DNA Behavior has been at the forefront of solutions that utilize behavioral data analytics. Their data-driven insights into behavior and money help businesses foster better client relationships, improve executive team performance, and maximize operational efficiency. DNA Behavior’s analytical power and extensive range of digital tools put the company on the path to creating customized experiences for over 1 billion people each year!

[Join the Waitlist for the Digital Scan](#)

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