

Tolerisk Unveils AI-Powered Tool to Transform Client Communication

MARLTON , NJ, UNITED STATES, November 18, 2024 /EINPresswire.com/ -- Tolerisk, a leading provider of fiduciary-caliber risk tolerance assessment technology, today announced the launch of a groundbreaking AI-powered feature that revolutionizes how financial advisors communicate with their clients. This innovative tool leverages artificial intelligence to generate personalized narratives tailored to each client's individual risk profile and preferred communication style.

"This new feature represents a paradigm shift in how advisors can connect with their clients," said Mark Friedenthal, CEO & Founder of Tolerisk. "By integrating AI, we're empowering them to deliver information in a way that resonates on a personal level, fostering deeper client understanding and trust."

Key features of the new tool include:

- **Tailored Client Communication:** Advisors can choose the tone of the narrative — from educational and professional to conversational and friendly — ensuring clients receive information in a way that resonates with them.
- **Personalized Learning Experiences:** The AI tool generates narratives customized to each client's comprehension style to promote deeper understanding of financial concepts.
- **Enhanced Advisor Efficiency:** The feature saves advisors time by automating the creation of personalized client reports without compromising quality or depth.
- **Streamlined Client Communication:** Advisors can effortlessly generate customized notes, summaries, recommendations, and emails with the click of a button.

This AI-powered tool is now accessible to all current Tolerisk software users. This is Tolerisk's latest breakthrough in innovation. Following the success of its 2023 UI redesign—which achieved a [user satisfaction rating of 8.87](#)—and its recognition in the 2024 Wealth Management Awards by WealthManagement.com Industry Awards in the Risk Tolerance/Client Profiling category, Tolerisk continues to demonstrate its commitment to providing cutting-edge solutions for financial advisors.

"Innovation is in our DNA. We're constantly exploring new ways to leverage technology to

enhance the advisor-client relationship,” Friedenthal added. “This AI tool is a testament to our dedication to addressing the evolving needs of the industry.”

To learn more about Tolerisk, [visit our website](#) or [book a personalized demo](#).

About Tolerisk

Tolerisk® is an analytical, multidimensional risk-tolerance assessment tool designed to improve and enhance advisor-client relationships through in-depth risk evaluations. In contrast with traditional risk tolerance assessment tools, Tolerisk measures a host of factors, including a client’s willingness and ability to take investment risk, client and advisor risk assumptions and the evolution of risk factors over time. For more information, visit <https://www.tolerisk.com/>.

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