

Etico Financial Partners with BetaSmartz to Redefine Wealth Management for Independent Advisors

Empowering RIAs with AI-powered tools for seamless financial planning, portfolio optimization, and unparalleled client insights.

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/EINPresswire.com/ -- [Etico Financial](#), a leader in customized investment

solutions, has announced a strategic partnership with [BetaSmartz](#), a globally recognized fintech innovator. Together, they will develop an advanced wealth management platform to empower independent Registered Investment Advisors (RIAs) with modernized tools and technology. The platform, slated for initial rollout in Asia and the U.S., will redefine how RIAs manage client portfolios and streamline operations.



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Kyle Webber, COO of Etico Financial

“This partnership exemplifies Etico’s commitment to delivering bespoke, high-touch solutions for independent advisors,” said Joseph Leo, CEO of Etico Financial. “By collaborating with BetaSmartz, we are bridging the technology gap in the wealth management sector, enabling advisors to operate smarter, more efficiently, and with greater impact.”

The new platform will serve as a comprehensive, all-in-one solution that integrates a wide range of financial services—including investment accounts, alternatives, banking, insurance, debt management, and real estate—offering RIAs a unified view of clients’ financial lives. Its AI-driven capabilities will allow RIAs to offer dynamic, real-time financial planning, portfolio management and deeper client insights.

“This platform will transform the RIA space by combining AI-powered automation with a personalized, high-touch advisory experience,” said Kyle Webber, COO of Etico Financial. “Our goal is to reduce operational complexities while enabling advisors to scale and expand their offerings effectively.”

Advanced features like automated portfolio generation, rebalancing, and performance reporting will replace outdated legacy portfolio management systems, providing a seamless user experience. By leveraging artificial intelligence (AI), the platform will enable advisors to make real-time adjustments to client portfolios based on changing market conditions and individual objectives.

Key Platform Features:

Robo-Advisor Digital Account Opening: Open new accounts in minutes, faster than the current robo-advisor services, with automated portfolio construction and ongoing optimization.

AI-Driven Portfolio Engine: Client-centric, dynamic portfolio construction with real-time adjustments based on the market environment, client risk tolerance, and goals.

Streamlined Workflow and Integration: Simplifies investment management, rebalancing, reporting, financial planning, and client communications.

Comprehensive Financial Planning Tools: Real-time progress tracking with the ability to set goals. Link and manage unlimited accounts and products for a holistic client view.

Expense Rationalization and Cybersecurity: Advanced cost-management and robust data protection for advisors and clients.

“This collaboration represents a significant step forward for the RIA market,” said Zak Allom, CEO of BetaSmartz. “We’ve been searching for the right partner to bring smarter, more efficient solutions to independent advisors in the U.S., and Etico ticks all the boxes.” BetaSmartz’s U.S.

deployment marks its second major launch in the American market, building on the success of its previous collaboration with a leading global electronic trading platform.

BetaSmartz's Chief Vision and Technology Officer, Michael Jackson, will lead the platform's development. "This collaboration is a unique opportunity to bring transformative solutions to independent advisors," he said. "We're excited to combine our expertise with Etico to deliver a best-in-class platform tailored to meet the demands of today's advisors."

The wealth management platform is expected to launch nationwide by late 2025.

About Etico Financial

At Etico Financial, we empower independent financial advisors to own their journey and build scalable, thriving practices. Designed by advisors, for advisors, our solutions combine tailored back-office support, cutting-edge technology, and flexible investment strategies to streamline operations, enhance client experiences, and drive growth.

We specialize in seamless transitions, personalized service, and transparent compensation, enabling advisors to focus on their clients while scaling their business without compromise. With Etico, you own 100% of your book of business, gain access to top-tier custodians, technology and leverage tools and strategies to grow with confidence.

Etico isn't just a partner—it's a platform for your success.

About BetaSmartz

BetaSmartz is a leading fintech firm, delivering next-generation digital transformation solutions to wealth and asset managers. The company offers cutting-edge business-to-business (B2B) software-as-a-service (SaaS) solutions that help financial institutions optimize client management and investment strategies through AI and automation.

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