

Cognerium Wins BISA 2025 Technology Award for Modernizing the Role of Financial Advisors with AI

Bank Insurance & Securities Association Honors Cognerium for Advancing Wealth Management with AI-Powered Innovation

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Cognerium, a leading AI-powered platform for financial institutions, has been awarded the [BISA 2025 Technology Award](#) for its groundbreaking advancements in wealth management.



This recognition highlights

[WealthGrowth.ai](#), a platform that revolutionizes the role of financial advisors by:

- Expanding advisor capacity, enabling firms to manage 10X more clients and leads.
- Increasing wallet share by up to 40% through optimized client engagement.
- Converting existing bank clients into long-term investment relationships.
- Enabling digital, remote, and centralized advisor models for greater efficiency.

Solving a Decades-Old Industry Challenge

For years, financial advisors have operated under the same constraints, managing 600 to 1,000 clients but only being able to focus on the top 20%. This limitation has stifled growth and restricted scalability across wealth management firms.

WealthGrowth.ai changes the game. By increasing advisor capacity 6 to 10 times and freeing up to 60% of their time, the platform shifts advisors' focus from administrative tasks to deepening client relationships and driving higher revenue.

What Sets WealthGrowth.ai Apart?

Built on Multi-Agent General Intelligence (MAGI), WealthGrowth.ai delivers unmatched AI-driven efficiency through:

- Agentic AI Workflow - A major step toward Artificial General Intelligence (AGI), integrating human expertise, AI-driven insights, and real-time market data to help financial institutions scale seamlessly.
- 64 AI Models - Purpose-built to predict and prescribe the best client strategies, providing personalized recommendations and automated decision support.
- Quantum AI Mechanics - Simulating multiple potential outcomes for every advisor action, allowing firms to optimize client engagement with precision.

Despite its advanced AI capabilities, WealthGrowth.ai remains simple to use, offering a streamlined, intuitive daily task list across mobile, tablet, and web. The platform also integrates seamlessly with 250+ APIs, connecting with CRMs, market data providers, and scheduling tools to ensure a fully connected experience.

About Cognerium

Cognerium's WealthGrowth.ai is an AI-powered platform designed to drive asset growth and advisor efficiency for financial institutions. Its Multi-Agent General Intelligence (MAGI) framework goes beyond wealth management, helping banks grow deposits by converting existing bank clients, without requiring additional resources.

Supported by IBM, the [Harvard Alumni Entrepreneurs Accelerator](#), and NVIDIA's Inception Program, Cognerium's leadership team brings over 200 years of combined experience in wealth management and AI innovation. With a proven track record, the platform enables seamless onboarding for financial institutions within just 3 to 4 weeks.

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