

# Meet the WealthTech leaders of 2025: FinTech Global releases seventh annual WealthTech100

*FinTech Global has published the new edition of its WealthTech100 list, highlighting the innovators shaping the future of investment and financial advice.*

LONDON, UNITED KINGDOM, April 2, 2025 /EINPresswire.com/ -- With the industry undergoing major change - from evolving client expectations and the great wealth transfer to regulatory pressures and emerging technologies - the 2025 [WealthTech100](#) recognises the trailblazers building scalable

solutions that meet the complex needs of private banks, asset managers, and financial advisors.



[FinTech Global](#)'s expert panel reviewed a field of over 1,200 businesses, selecting 100 standout companies that demonstrated innovative use of technology to solve significant industry challenges or drive efficiency across the wealth management value chain. The goal is to highlight the 100 WealthTech companies that every leader in the investment industry should know about in 2025.

The great wealth transfer is forcing firms to look to their future customers and the best way to serve them. This is leading to a greater adoption of technology that empowers hyper-personalisation, access to new assets and improved client engagement. With so many WealthTech solutions available in the market, the WealthTech100 is designed to be a vital guide for firms.

FinTech Global director Richard Sachar said, "This year's selection process was more competitive than ever. With clients expecting hyper-personalised digital experiences and global events continuing to test market resilience, firms can no longer rely on legacy systems or reputation alone. The 2025 WealthTech100 will help senior decision-makers in the investment industry

identify the solution providers who can transform their businesses and help them stay ahead in this highly dynamic market.”

Here are just some of the innovative companies that feature in this year’s list:

Abbove: family-centric wealth advisory platform enabling advisors to deliver personalised, goal-based advice and connect with the next generation

additiv: enables firms to innovate, automate, and scale financial services—transforming business models, expanding distribution, and reducing costs from a single platform

CAIS: the leading alternative investment platform for independent financial advisors

Croesus: leader in innovative WealthTech providing accurate, robust, high-performance and secure solutions for efficient, hyper-personalized and compliant portfolio management and rebalancing

Finfox: a leading digital platform for hybrid wealth management, ensuring an engaging, regulatory-compliant, and seamless advisory experience across all channels

ERI: provider of the OLYMPIC Banking System® - an integrated, real-time, front to back banking and wealth management technology platform

Expersoft Systems: global provider of wealth management platforms for banks, independent wealth managers, asset managers, and family offices

Finaplus: as a pioneer of true Wealth-as-a-Service, the German company harnesses 25+ years of experience and strives to shape the future of Wealth Management

Fincite: European WealthTech software provider empowering financial institutions to provide digital investment services – from onboarding to reporting - to their clients

FIS Global: a leader in financial services technology, advancing the way the world pays, banks, and invests

Fundpath: transforming investment distribution through smarter connectivity

GrowthInvest: the Alternative Investment Platform. Making tax-efficient, alternative and private market investments more accessible to wealth managers, financial advisers, and their clients

Infront: helping financial professionals manage portfolios, trade, access market data, serve clients and stay compliant – all in one integrated platform

IntelliTrade: provides efficient and cost-effective solutions for managing and trading financial products, and managing financial data

IRALOGIX: its unique technology enables clients to profitably expand their wealth business while providing better products with institutional quality investments for everyone

Keenai Pulse: the adaptive command Center for Single Family Offices — engineered to see ahead, stay in control, and move with intelligence.

Lumenai: a quantitative and AI investment manager helping family offices, advisors, and asset managers create hyper-custom, alpha-seeking investment portfolios

MSCI Wealth Manager: Portfolio management for wealth management firms to deliver personalized client proposals & portfolios at scale

Nextvestment: transforming wealth management with Generative AI — scaling personalized advice and making premium guidance accessible to all

Ortec Finance: Translate clients' personal financial goals into a suitable investment strategy using institutional-grade economic scenarios and proactively monitor advice with OPAL

Prometeia: provides advanced wealth management software and data solutions, serving 500+ financial institutions in 20 countries since 1974

PureFacts: End-to-End Revenue Management helping wealth management, asset management and asset servicing firms manage, optimize and grow their revenues

QPLIX: transforms wealth management with top-tier software, providing scalable, data-driven portfolio management solutions for financial professionals

STRATxAI: a WealthTech harnessing Quantitative Intelligence to deliver custom model portfolios and actionable investment insights

TaxStatus: provides frictionless access consent-based IRS tax data to provide wealth firms a comprehensive financial picture for their clients

Univeris: delivers future-ready WealthTech solutions that automate workflows, ensure compliance, and drive sustainable growth

WealthObjects: an intuitive all-in-one wealth platform with CRM, Financial Planning, and Investor Portals to help operate every business cost-effectively

The full WealthTech100 list, including detailed profiles of each company, is now available for A

full list of the WealthTech100 and detailed information about each company is available to download for free at [www.WealthTech100.com](http://www.WealthTech100.com).

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