

Shaping Wealth and Sherpas Partner to Make AI-Driven Financial Advice More Human

The partnership integrates Shaping Wealth's Lydia™ into Sherpas' AI agent infrastructure, bringing behavioral intelligence directly into the advisor workflow

CHICAGO, IL, UNITED STATES, September 5, 2025 /EINPresswire.com/ -- [Shaping Wealth](#), the

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Borja Edo

leading provider of behavioral science-based learning and engagement solutions for the wealth management industry, and [Sherpas](#), the AI-powered growth platform for advisors, today announced a partnership to redefine financial advice in the age of AI. This collaboration will embed Shaping Wealth's proprietary behavioral intelligence engine, [Lydia™](#), directly into Sherpas' AI agents to help advisors deliver more personalized, emotionally intelligent support.

The partnership is grounded in a simple but

transformative idea: great advice helps people feel seen, understood, and confident in their decisions. Together, Shaping Wealth and Sherpas will infuse behavioral coaching and human-first language into AI-generated plans, meeting prep, and advisor communications.

“Most AI in wealth management is built for efficiency. We're building something that's also human-centric, empathetic, and designed to move clients to action,” said Borja Edo, CEO of Sherpas. “Our AI agents don't just calculate what's financially optimal. They help advisors speak in a language clients trust and act on. Shaping Wealth is the perfect partner to make this vision real.”

Brian Portnoy, founder of Shaping Wealth, added: “Lydia isn't just another AI; she's a thought partner, an empathetic collaborator, and a guide to deeper, more meaningful conversations. This integration is a critical step in our mission to elevate human-first financial guidance. With Sherpas, we're bringing Lydia into the heart of where advice happens—not just in theory, but in practice.”

The initial integration will bring Lydia's insights into core Sherpas AI infrastructure, including its Paraplanner and Portfolio Analyst agents, with more capabilities on the roadmap. This announcement comes just ahead of the Future Proof Festival in Huntington Beach, Calif., where

Sherpas will showcase how AI can be deeply intelligent and deeply human.

About Shaping Wealth

Shaping Wealth is a learning and engagement platform that empowers financial professionals to thrive personally and professionally. Through live programs, digital content, and intelligent tools like Lydia™, Shaping Wealth helps advisors build stronger relationships, make better decisions, and deliver advice that truly resonates. Learn more at shapingwealth.com.

About Sherpas

Sherpas is building the future workforce for financial advisors, an AI-powered team that scales prospecting, planning, and portfolio analysis effortlessly. By automating the manual work behind advice, Sherpas multiplies an advisor's capacity to convert more leads, deliver more plans, and grow faster. Learn more at sherpaswealth.com.

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