

Knomee Debuts Free Trial, Expanding Behavioral Intelligence in Wealth Management

New finance platform gives FAs & wealth management firms no-cost way to accelerate planning conversions, retain next-gen clients & simplify advisor transitions



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[Knomee](#), the behavioral finance platform transforming how wealth firms build trust and scale personalization, today announced the launch of a [free trial](#), giving every advisor free access to its scientifically-backed digital discovery experience and scalable behavioral data infrastructure.

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I built Knomee after 20 years of watching advisors struggle to deliver personal advice at scale. This launch puts the right insights in every advisor's hands.”

Knomee CEO Marla Sofer

Founded by fintech veteran and former advisor Marla Sofer, who held leadership roles at BlackRock, JPMorgan, Invesco, Microsoft, and Carta, Knomee launched in 2023 and now powers behavioral discovery across numerous RIA firms, enterprise pilots, and thousands of client financial identity profiles.

The new free trial offers advisors full access to Knomee's guided behavioral discovery journey, surfacing client values, goals, emotional drivers, and life events through a

gamified, self-reflective experience. Advisors receive real-time AI-powered insights and conversational prompts that personalize outreach, reduce onboarding friction, and deepen trust. Designed for key moments like onboarding, reviews, transitions, and generational planning, Knomee helps advisors identify intent, assess readiness for action, and deliver timely, values-aligned advice.

By standardizing emotional discovery, Knomee enables firms to differentiate their offering, uncover upsell opportunities, and inspire asset growth and long-term loyalty through stronger client relationships.

“Firms are eager to deploy AI to deepen engagement, but data limitations are holding them back. Although over [90% of firms segment clients, just 28% deliver truly tailored solutions](#),” said Will

Trout, Director of Securities & Investments at Datas Insights. “Knomee addresses this shortfall by building a scalable behavioral data layer so firms can capture values, motivations, and life context continuously, helping to balance high-touch service with technology-enabled efficiency.”

The need for this capability is growing rapidly. As \$124 trillion transitions to the next generation, and mass-affluent households approach high-net-worth status, expectations for meaningful, personalized service are rising across client segments. While many firms have automated investment and product delivery, few have deployed a structured, behavioral discovery layer that can guide ongoing engagement. Knomee makes this possible without adding operational drag. [Read about Cerulli's \$124 trillion wealth transfer prediction here: <https://www.cerulli.com/press-releases/cerulli-anticipates-124-trillion-in-wealth-will-transfer-through-2048>]

Early traction is strong. RIAs using Knomee have accelerated onboarding by up to 4x, grown wallet share, and increased team alignment. At Archer Investment Management, Knomee helped boost client referrals and deepen planning relationships across the book. [Read Archer's case study here: <https://docsend.com/view/sfbui9wwiwaks3ee>]

“I built Knomee after 20 years of watching advisors struggle to deliver personal advice at scale,” said Marla Sofer, Knomee’s CEO. “Whether I was leading provider strategy at BlackRock or working side-by-side with advisors, the pain was always the same: too many assumptions, not enough real data. This launch puts the right insights in every advisor’s hands so they can convert faster, retain longer, and serve clients in ways that truly matter.”

The free trial includes:

- One free month to invite up to 5 clients to complete the guided discovery experience,
- AI-generated conversation prompts and segmentation insights,
- Data export to support CRM and planning workflows,
- Access to Knomee’s core discovery adventures for values and goal articulation.

Availability & Signup:

Advisors can sign up today at <https://www.knomee.com/pricing>. Paid plans for Enterprise, Premium, and Partner tiers offer expanded features, integrations, and customization.

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