

Shaping Wealth Taps Fintech Veteran Corey Westphal as CRO to Power AI Expansion in Wealth Management

Wealthtech veteran to lead growth as firm expands from education company to embedded AI platform

CHICAGO, IL, UNITED STATES, February 18, 2026 /EINPresswire.com/ -- [Shaping Wealth](#), the leading provider of behavioral science-based learning and engagement solutions for the wealth



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management industry, today announced the appointment of Corey Westphal as Chief Revenue Officer. Westphal joins as the company accelerates its strategic evolution from educational content provider to AI-native technology platform with the launch of [Lydia](#), a behavioral intelligence engine that embeds real-time coaching directly into advisor workflows.

Westphal brings 15 years of wealth management technology leadership to his role at Shaping Wealth. As

founder of Mobile Assistant, he pioneered advisor-first workflow innovation, earning approved-vendor relationships with LPL Financial, Osaic, TIAA, and Truist Bank. He led his team in building CRM-embedded API integrations that helped teams capture and apply client meeting insights to strengthen client relationships.

“With Lydia, Shaping Wealth is solving the right problem at exactly the right time: guiding advisors to stay deeply human as AI reshapes the industry,” said Westphal. “Real growth happens when a tool earns a place in the advisor's workflow and strengthens the client relationship. Lydia does both.”

Westphal is stepping into his new role as Shaping Wealth positions Lydia for rapid adoption across RIAs, broker-dealers, and fintech platforms. Lydia operates as a behavioral intelligence engine built on Shaping Wealth's proprietary corpus of thousands of behavioral finance insights developed over a decade. The multi-agent platform leverages dozens of purpose-built workflows that support advisors through difficult client conversations, major financial decisions, team development, and advisor wellbeing.

Early adoption continues to validate the demand for behavioral intelligence as a distinct layer in

the advisor tech stack. The Lydia prototype already launched in Shaping Wealth's [Compass](#) content platform has processed thousands of user inquiries, revealing the demand for practical coaching insights that help advisors improve client conversations and outcomes.

"We're building the behavioral intelligence layer of the modern advice stack," said Brian Portnoy, CFA, Ph.D., Founder and CEO of Shaping Wealth. "Corey understands that growth in this industry comes from earning a place in the advisor's daily workflow. His leadership will be critical as we scale Lydia across institutions that recognize human-facing skills as their next competitive differentiator."

As CRO, Westphal will oversee revenue strategy, partnership development, and go-to-market execution as Shaping Wealth pursues integration opportunities with CRM platforms, financial planning software, and digital engagement tools. His experience building institutional partnerships and API-based integrations directly supports Shaping Wealth's platform strategy, with more than a dozen fintech partnerships currently in development, including Conquest, Focal, YCharts, Seeds, Contio, Sherpas, Hamachi, Perscient, and Fundment.

Shaping Wealth will showcase Lydia at Future Proof Citywide in March as part of the event's highly selective AI Demo Drop presentation. The appearance marks the platform's first major industry debut since launching its AI-powered capabilities and positions Shaping Wealth to capitalize on growing demand for tools that differentiate advisory firms in an increasingly commoditized market. As AI reshapes client expectations and operational efficiency, behavioral intelligence represents one of the few remaining areas where human advisors maintain defensible competitive advantage. Per Portnoy, "Lydia replaces no one and enhances everyone."

To learn more about Shaping Wealth and Lydia, visit www.shapingwealth.com.

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