

Proven Early Results from WealthGrowth.ai

Within 30–60 days, WealthGrowth.ai helped advisors save 60% of their time, expand capacity to manage more leads and clients, and strengthen client engagement.

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The wealth management industry is reaching a point where traditional advisor workflows are no longer scalable. Advisors are expected to deepen client relationships, manage more assets, and deliver increasingly personalized advice. Yet most of their time is still consumed by manual processes, fragmented data, and operational tasks.

Cognerium has been working with two mid-sized wealth management firms - one based in the United States and another operating globally - to pilot [WealthGrowth.ai](#), an Agentic AI platform designed specifically for wealth management.

The goal was simple: determine whether advanced AI automation could fundamentally change how advisors operate.



Our early pilots show that Agentic AI can dramatically expand advisor capacity while improving client engagement and driving measurable growth.”

Assad Shaik, CEO, Cognerium AI

The early results have been encouraging.

Results Within the First 30–60 Days

During the initial deployment phase, several measurable improvements were observed.

1. Advisors regained approximately 60% of their time. Routine administrative work, manual analysis, and fragmented workflows were automated. Advisors were

able to redirect this time toward client engagement, portfolio discussions, and growth

Early Results in First 30 Days

 **60%** advisor time freed from manual tasks

 **6X** advisor capacity to manage clients

 Consistent performance across advisor teams

12-Month Impact

 **3–4X** Increase in client product usage

 **Wallet share** growth from **30%** to **70%**

 **New asset growth** driven by scalable advisory

COGNERIUM AI

opportunities.

2. Advisor capacity increased by up to six times.

Traditionally, advisors can effectively manage only a limited number of relationships due to operational constraints. By automating large portions of workflow and intelligence gathering, advisors were able to manage significantly more clients and pursue new leads without increasing staff. This represents a fundamental shift in how advisory practices can scale.

3. Advisor performance became more consistent across teams.

With AI-enabled advisor coaching, mid-performing advisors began operating more like top performers. Management teams also gained better visibility into advisor activities, opportunities, and client engagement.

What This Means Over the Long Term

The long-term potential becomes even more significant as these systems mature.

Based on the early results and modeling from the pilot environments, institutions implementing this approach can expect the following outcomes over the next 12 months:

- 3–4× increase in client product usage
- Wallet share expansion from roughly 30% to nearly 70% among existing clients
- Substantial growth in new assets under management driven by increased advisor capacity

As advisors are able to handle more relationships and respond to opportunities faster, firms can bring in new assets while deepening existing client relationships.

The Bigger Shift

For decades, technology in wealth management has largely focused on improving systems of record and reporting. What we are now seeing is the emergence of systems of intelligence and action.

Agentic AI platforms such as WealthGrowth.ai do not simply analyze data. They help execute tasks, surface opportunities, and orchestrate workflows across the entire advisory lifecycle.

The result is not just improved efficiency - it is a transformation of the advisor role itself.

Advisors move away from operational overhead and toward what they do best: building trust, guiding financial decisions, and growing client relationships.

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