

WealthFluent Announces the Launch of New Products and Services

The Updated Features will Enhance Function and Performance

DENVER, CO, UNITED STATES, March 23, 2026 /EINPresswire.com/ -- [WealthFluent](#), a [personalized financial decision-making companion](#) to empower strategic investors to make clear, confident decisions tailored to their unique situation, preferences, lifetime financial goals, and market conditions, announces the launch of new products and services to their offerings.



The updates include the addition of: Financial Wellness Score- a single 0-100 gauge that captures complete financial health — scored across seven weighted factors including downside risk, net worth growth, goal probability, portfolio efficiency, debt health, diversification, and savings rate; Debt Health Score- every loan classified as Good, Bad, or Ugly — based on account type and interest rate; Behavioral Discipline Score- financial outcomes that track behavior more than markets; Transactions Page: Six Smart Insights- auto-calculated from transaction history, savings rate, average daily spend, top expense category, spending trend (first half vs. second half), transaction count, and recurring expense detection (finds subscriptions automatically.)

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David J. Kon, WealthFluent Co-Founder and CEO

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Other updates include a Markets Page: full revamp U.S. Yield Curve (with historical comparison),

Forward-Looking Bonds analysis;
Forward-Looking Stocks, Sectors, VIX,
and Crypto — all in one place; Live
ticker tape. financial news feed, and
market settings for customization;
Liquid Assets Widget - instant view of
liquid vs. semi-liquid wealth and what
percentage of your portfolio is actually
accessible; Wealth Plan PDF Export
updated to include a full income
statement to share with an advisor,
accountant, or family; Today's Change
on Net Worth- Betas- for securities in a
Portfolio tab; and Performance
Summary Emails- now with an option
to choose daily, weekly or monthly
performance emails with AI insights.

WealthFluent hopes that the updated
features will empower everyday
investors to manage their finances
independently, without gatekeepers.

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About WealthFluent

Empowering strategic investors to answer life's big financial questions

WealthFluent is a personalized financial decision-making companion designed to empower users to make clear, confident decisions tailored to their unique situation, preferences, lifetime financial goals, and market conditions. WealthFluent brings finances together in one smart dashboard—investment accounts, mortgages, loans, retirement funds, crypto, and everything in between, helping strategic investors make confident, real-time decisions about their money, along with Magpie, an AI companion. Founded by Stanley J. Kon, PhD and his two sons, David J. Kon and Joshua P. Kon, WealthFluent's vision is to enable individuals to take control of their financial future and confidently navigate life's big financial decisions. WealthFluent is available at www.wealthfluent.com, Google Play, and the Apple App Store.

Maya Brook

ShuBu Creative

+1 720-237-9535

[email us here](#)

Visit us on social media:

[LinkedIn](#)



David J. Kon, WealthFluent Co-Founder and CEO

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