

WealthFluent Launches the New AI Portfolio Optimizer

The Upgrade Allows Users to Execute Their Wealth Plan

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[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 new [AI Portfolio Optimizer](#) available starting today for all Premium and Lifetime subscribers.

[Powered by Magpie](#), WealthFluent's cutting-edge agentic AI, the AI Portfolio Optimizer analyzes current holdings across every account, compares them to each user's personalized

benchmark, and shows exactly what they need to change and where, to bring their portfolio in line with their wealth plan. It finds the right investments, places them in the right accounts for risk management, tax efficiency, and explains the reasons along the way.

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The AI Portfolio Optimizer fundamentally changes what's possible for self-directed investors.”

*David J. Kon, WealthFluent
CEO and Co-Founder*

“The AI Portfolio Optimizer fundamentally changes what's possible for self-directed investors,” says David J. Kon, WealthFluent CEO and Co-Founder. “It's time to take control of your portfolio and let Magpie find the right investments across all of your accounts to match your lifetime wealth plan.”

The AI Portfolio optimizer runs across user's accounts simultaneously, comparing their current allocations to an investor's 401(k), IRA, and taxable



David J. Kon, WealthFluent Co-Founder and CEO

accounts.

“The AI conversation and the optimization results live in the same view, updating in real time. It provides cross-account intelligence,” explains Kon.

The AI Portfolio Optimizer’s primary goal is to close the gap between the user’s current portfolio and the personalized benchmark derived from a lifetime wealth plan including: tax-smart placement, strategy analysis, conversations with voice input, and AI-suggested constraints and transparency.

The AI Portfolio Optimizer is available today for all Premium and Lifetime subscribers. New users to WealthFluent can try a 14-day free trial to experience “the future of portfolio management.” Through April, The Lifetime deal is \$600 (down from \$1,200). Learn more at www.wealthfluent.com.

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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.

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