

Couplr.ai Partners with InterGen Data to Drive Organic Growth, Advisor Productivity, Client Retention, and Revenue

Partnership adds Life Event Predictive capability to enable banks, financial service firms, and insurers to identify clients nearing major financial decisions

ORLANDO, FL, UNITED STATES, April 14, 2026 /EINPresswire.com/ -- [Couplr.ai](https://www.couplr.ai), the AI-powered advisor-matching platform adopted by leading financial firms and broker-dealers, today announced a strategic partnership with [InterGen Data](https://www.intergen-data.com) Inc. to embed predictive Life Event Intelligence directly into its platform.

The logo for Couplr.ai, featuring the word "couplr.ai" in a dark green, lowercase, sans-serif font. The "o" and "p" are stylized with white arrowheads pointing to the right.The logo for InterGen Data, featuring the word "InterGen" in a blue, sans-serif font, followed by a blue circle containing the word "DATA" in white, uppercase, sans-serif font.

The new capability gives firms a systematic, data-driven answer to the questions their advisors have never been able to reliably answer: Which clients do I contact? About what? When? And why?

For firms managing large advisor networks and millions of client relationships, the cost of answering those questions incorrectly is enormous with lost cross-sell opportunities, advisor attrition, and distribution revenue left on the table. Embedding InterGen Data's intelligence within Couplr eliminates that inefficiency.

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Derek Notman

The Problem Firms Can No Longer Afford to Ignore
The urgency is growing. As the largest Boomer cohort ages, an estimated \$68 trillion in wealth is expected to transfer by 2035. At the same time, the next generation is reaching

key financial decision points and is likely to switch providers if there is not timely, proactive engagement.

Firms that capture this opportunity won't be those with the most advisors, but those whose advisors engage the right clients, at the right moments, before decisions are made. That intelligence gap is what the Couplr and InterGen Data partnership is designed to close.

Derek Notman, Founder and CEO of Couplr explained, "Firms invest heavily in their advisors, but most of those advisors still rely on static contact lists, referrals, 3rd party cold leads, or data-scraping tools. We built Couplr to fix the front end, getting the right advisor in front of the right client. InterGen Data extends that value by enabling ongoing, intelligent engagement. Together, we transform distribution into a proactive system that drives measurable growth."

What the Life Event Intelligence Layer Delivers

InterGen Data's predictive engine analyzes billions of demographic, behavioral, and economic signals at the individual and household level to identify consumers who are approaching major life events—one to five years in advance. These are the exact moments when financial decisions are made, loyalties shift, and revenue is won or lost.

Embedded within Couplr, this intelligence from InterGen Data enables firms and advisors to:

- Prioritize clients and prospects approaching key life transitions such as children, divorce, retirement, inheritance, job change, or home purchase
- Align product and service opportunities to each client's likely financial needs
- Trigger timely, proactive outreach based on real engagement windows rather than arbitrary schedules
- Segment clients by opportunity value to optimize advisor focus and resource allocation
- Re-engage dormant or orphaned clients at moments when they are most likely to act

"Advisors and firms consistently tell us they lack a systematic way to know which client to call today," said Rob Kirk, Founder & CEO, InterGen Data Inc., "By embedding life event prediction into the advisor-client relationship, we change the trajectory of that relationship and the revenue it generates."

A Distribution Advantage, Not Just a Feature

The Couplr platform is designed for white-label deployment by financial service firms, insurers, and banks, integrating with existing advisor networks, compliance processes, and CRM systems. The InterGen Data Life Event Intelligence capability is embedded directly within the platform, allowing firms to benefit from advanced predictive insights without adding operational complexity.

For partners, the impact is clear: increased organic growth and client retention, improved advisor productivity, higher conversion rates, and more effective reactivation of dormant relationships.

Validated Through Enterprise Partnership

Couplr is currently piloting its platform with a major insurer through the [MassChallenge](#) Fintech program, one of the most rigorous enterprise financial technology validation tracks in the

industry.

About Couplr.ai

Couplr is an AI-powered financial advisor matching platform built for white-label deployment by banks, financial service firms and insurers. The platform connects consumers with the right advisor based on shared personality, values, financial goals, and life stage—using a proven matching methodology that drives higher intent, faster conversion, and stronger advisor-client relationships. Couplr integrates with major CRM platforms including Redtail and Wealthbox and is designed for enterprise compliance environments. Learn more at www.couplr.ai

About InterGen Data Inc.

InterGen Data is a predictive intelligence company serving the financial services and healthcare industries. Using advanced data science, we predict 95 health and wealth life events and their financial impact — one to five years in advance — including critical illness, financial stress, retirement, and major life transitions. Operating as an embedded intelligence layer within existing platforms and workflows, InterGen Data enables organizations to engage individuals with greater precision and timing, improving client retention, operational performance, and revenue growth. Learn more at www.intergendata.com

Derek Notman

Couplr, Inc.

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