

Arcus Partners® Launches Arcus Edge™, an AI-First WealthTech Intelligence Platform for Independent RIAs and Wealth Firms

SYNTHIFY™, ArcusX AI™, and Finity360™ — three proprietary layers, one AI-first platform built for independent RIAs and wealth management firms.



PHILADELPHIA, PA, UNITED STATES,

June 16, 2026 /EINPresswire.com/ -- Arcus Partners®, an AI-first wealth management technology firm and Salesforce ISV and AWS Technical Partner, today announced the launch of [Arcus Edge™](#), a unified WealthTech Intelligence Platform purpose-built for independent RIAs, wealth management firms, and boutique broker-dealers. Arcus Edge™ brings together three proprietary

technology layers — [SYNTHIFY™](#), [ArcusX AI™](#), and Finity360™ — into a single AI-first architecture designed to deliver each firm's signature client experience consistently, at scale.

“

Arcus Edge was built to solve that — not by adding AI on top of fragmented systems, but by building the intelligence into the foundation from day one. That is what AI-first actually means.”

Gerry Murphy, CEO and Partner, Arcus Partners®

A Market Flooded With AI Claims — and a Platform That Delivers

The wealth management technology market has seen an unprecedented wave of AI-first claims. Yet for most independent firms — firms with real clients, real compliance obligations, and real operational complexity — AI implementations have fallen short. The reason is

architectural: AI is only as intelligent as the data foundation it acts on, and most platforms bolt AI on top of fragmented systems never designed to support it.

Arcus Edge™ was built differently. The data foundation — SYNTHIFY™ — was engineered first. The intelligence layer — ArcusX AI™ — was designed to act on that structured foundation. And the client experience layer — Finity360™ — was built to deliver each firm's unique signature experience to every client, every time. Intelligence at the core. Not an add-on.

“Every firm in this market has a signature — a way of serving clients that makes them different. The problem has always been delivering that signature consistently, without it depending on one

person to remember. Arcus Edge was built to solve that — not by adding AI on top of fragmented systems, but by building the intelligence into the foundation from day one. That is what AI-first actually means."

— Gerry Murphy, CEO and Partner, Arcus Partners®

The Arcus Edge™ Architecture: Three Layers, One Platform

SYNTHIFY™ — Data Intelligence Layer: An AWS-architected proprietary data lake purpose-built for wealth management. SYNTHIFY consolidates data from CRM, custodians, documents, and client systems into a single structured model — the foundation that makes AI actually work.

ArcusX AI™ — Intelligence Layer: The agentic AI layer that acts on SYNTHIFY's unified data foundation. ArcusX AI executes firm-specific workflows — meeting preparation, document processing, compliance workflows, and Salesforce operations via natural language — with human-in-the-loop governance built into the architecture.

Finity360™ — Client Experience Layer: A native Salesforce application suite covering the complete operational client lifecycle — documents, forms, account tracking, and recovery workflows. Finity360 is where the firm's signature experience reaches the client: every touchpoint, every interaction, delivered the firm's way — consistently, at scale.

"What Arcus Edge represents is the full picture — everything working together as one platform. Our clients experience it as a seamless, consistent relationship with our firm. That's what a signature experience looks like when the architecture is built to deliver it."

— Ken Fischer, Chief Technology Officer, Realta Wealth

What Makes Arcus Edge™ Genuinely AI-First

Data foundation before AI layer: SYNTHIFY™ was architected and deployed before ArcusX AI — designed to act on clean, structured, wealth-management-specific data, not retrofitted onto fragmented systems.

Wealth management-specific workflows: ArcusX AI™ executes the operational workflows of wealth management firms — custodian processing, ACAT workflows, client onboarding, compliance document review, and advisor meeting intelligence — built in, not configured.

Human-in-the-loop governance: Every ArcusX AI™ action that creates, updates, or deletes a record requires explicit human approval, with full audit logging and per-user Salesforce permission inheritance.

Salesforce ISV and AWS Technical Partner: Built natively on the two most trusted enterprise platforms in financial services, with open standard MCP architecture on the connector layer.

Availability

Arcus Edge™ is available now for SMB, independent RIA, wealth management, and boutique broker-dealer firms. Contact Arcus Partners to request a platform evaluation.

About Arcus Partners®

Arcus Partners® is an AI-first wealth management technology firm and Salesforce ISV and AWS Technical Partner headquartered in New York, NY. The company builds and operates Arcus Edge™ — a unified WealthTech Intelligence Platform comprising SYNTHIFY™ (data intelligence), ArcusX AI™ (agentic intelligence), and Finity360™ (client experience) — purpose-built for independent RIAs, wealth management firms, and boutique broker-dealers.

Gerry Murphy

Arcus Partners

+1 978-884-0247

gerry.murphy@arcuspartners.com

Visit us on social media:

[LinkedIn](#)

[YouTube](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/919800955>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2026 Newsmatics Inc. All Right Reserved.