Wealth Write.Up Transforms Investment Accounting Operations with New AI-Powered Statement Importer

99.9% Data Extraction Accuracy Saves Precious Time & Money

MONTREAL, QUEBEC, CANADA, June 18, 2026 /EINPresswire.com/ -- Wealth Write.Up is delighted to announce the launch of its game changing AI-powered Statement Importer. Integrated directly into its core investment accounting platform, this new capability accelerates brokerage statement data processing and eliminates a critical accounting workflow bottleneck.

> For nearly three decades, manual statement entry has been the most tedious and error-prone job in investment accounting. Our AI takes that burden off the table”
>
> *Radu Paraschiv, CTO, Wealth Write.Up*

A pioneer in complex securities portfolio accounting for over 27 years, Wealth Write.Up leverages AI to streamline accounting operations across professional services firms, family offices, foundations, and corporations.

Wealth Write Up’s new Statement Importer extracts unstructured brokerage data from any format including Excel, PDF, TXT, and scanned documents— and converts it into structured transactions in seconds, reducing data entry time by up to 90%. Transactions are then directly posted into the system with 99.9% data extraction accuracy: high-confidence records flow seamlessly into the system, where accounting professionals review the results and finalize to our general ledger. AI helps flag errors and allows users to make bulk updates with a simple conversation.

“For nearly three decades, manual statement entry has been the most tedious and error-prone job in investment accounting. Our AI takes that burden off the table — enabling firms to shift their best people from typing PDFs to the review and advisory work clients actually pay for, while keeping client data sovereign and secure.” --— Radu Paraschiv, CTO, Wealth Write.Up.

Built with strict data sovereignty principles, Wealth Write Up’s Statement Importer ensures client data remains entirely under customer control and operates securely within their existing environment.

With this release, Wealth Write.Up automates a persistent, resource-intensive workflow: the manual processing of unstructured brokerage statements that often arrive in multi-page formats, multiple languages, and scanned documents, requiring substantial operational time and capital.

About Wealth Write.Up

Wealth Write.Up is a Canadian-based investment accounting platform designed for professional services firms, family offices, corporations, and investment firms. For over 27 years, the solution has helped organizations simplify complex investment accounting including multi-custodian and multi-currency transactions, while delivering precise financial reporting and actionable insights. Trusted by 250 + organizations and used by 1,800 + professionals, Wealth Write.Up offers cloud-based access with data hosted in Canada. The platform is purpose-built to meet the compliance and performance needs of Canadian investment accounting.

https://wealthwriteup.com/

For Media Inquiries, contact:
Joey Gill, Public Relations   + 1 416 556 0675   joey@hiconcept.ca

Joey Gill
Hi Concept Publicity and Productions
+1 416-556-0675
email us here
Visit us on social media:
LinkedIn
