FastTrackr AI Introduces the First AI-Native Platform Built to Run Advisor Transitions End to End

An advisor team using FastTrackr AI moved $100M across roughly 150 households in 2 weeks with zero repapering errors, on a platform built to manage the move.


FastTrackr AI Leadership Team, from left to right; Vineet Mohan, Kartik Kumar, Pradhumn Vijayvargiya

SAN FRANCISCO, CA, UNITED STATES, August 5, 2026 /EINPresswire.com/ -- In a transition completed a couple of months back, an advisor team moved approximately $100 million across 150 households in two weeks, starting from zero client data. It was a move from a broker-dealer to a major registered investment advisor, with zero not-in-good-order errors arising from repapering and 100 percent straight-through processing. According to the published case study, 70 percent of households were signed and moved by the end of the second week.

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>
> *Nico DeMaio*

The transition was run on FastTrackr, which the company describes as the first AI-native platform built to manage an advisor book move end to end: it fully automates client data collection, populates & pushes custodian and firm paperwork to e-signature, and provides real-time visibility across the entire move on the go.

The results stand out against an industry norm. Advisor movement is at a high point; Diamond Consultants reports 11,172 experienced advisors changed firms in 2025, up 16 percent year over year. Yet the mechanics of moving a book remain largely manual. Research from Cerulli Associates indicates roughly one-fifth of client assets are lost when an advisor changes firm affiliation.

Much of the attrition occurs during the repapering process that can stretch a transition to 60-90 days or longer. The difference with FastTrackr shows up on day one. Instead of an advisor's team rekeying data and chasing clients for paperwork, FastTrackr gathers everything the destination custodian and firm require, drawing automatically from available sources — both structured or unstructured — and turns it into completed paperwork, ready for execution.

The compression is dramatic. Transitions that typically take two to three months are completed in two to three weeks, so assets transfer in weeks rather than months, revenue is booked sooner, and clients have less time to drift away.

The result is a move that protects both the relationship and the revenue. "We rebuilt the entire flow so revenue is booked sooner, assets are transferred faster, and fewer clients are lost along the way," said Vineet Mohan, founder and CEO of FastTrackr. "Cutting transition time by more than 70 percent changes the economics of a move entirely."

"The hardest part of moving a book has never been the decision to move, it's the mechanics," Mohan added. "So many teams know they want to move but stay stuck because the operational lift is daunting. FastTrackr removes the barrier."

AdvizorStack, an established transition consultant and FastTrackr partner, used the FastTrackr platform to run the transition. "We moved a $100 million book in under two weeks with zero NIGOs, which is not something I would have called realistic doing it the old way," said Nico DeMaio, President of AdvizorStack. "The repapering that usually eats the first month was completed in days, allowing the team to spend its time with clients instead of chasing signatures."

"Transitioning was the most stressful month I've had in my career. Working with FastTrackr allowed me to focus on contacting clients and devote very little mental energy to the details around completion of paperwork," said the lead advisor on the team that made the move.

Backed by GAI Ventures, FastTrackr AI supports advisor transitions into leading custodians including Fidelity, Schwab, and Goldman Sachs.

About FastTrackr AI
FastTrackr is an AI-native platform built to run advisor transitions from end to end, from data collection through opened accounts and transferred assets. Founded in 2025 and backed by GAI Ventures, FastTrackr works with the advisor teams, consultants, and operators, who manage advisor and book transitions across the wealth management industry. More information is available at our website.

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