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Couplr Becomes First Behavioral-Compatibility Advisor-Matching Platform Live Across 4 Major AI Ecosystems in Single Day

Couplr is the first behavioral-science advisor-matching platform to launch across ChatGPT Store, Poe, Meta AI Studio, and Grok.

Couplr

ORLANDO, FL, UNITED STATES, July 7, 2026 /EINPresswire.com/ -- Couplr, Inc., the smart advisor-matching platform for wealth management and insurance firms, today announced that its consumer-facing AI agent, Couplr AI, is now live across four major AI platforms: the ChatGPT Store, Poe, Meta AI Studio (which spans Instagram, Messenger, and WhatsApp), and Grok, the AI assistant from xAI. All four deployments went live simultaneously on July 6, 2026.

> Consumers don’t wake up thinking, ‘I need to visit a financial services directory today.’”
>
> *Derek Notman, CFP®*

With the launch, Couplr becomes the first advisor-matching platform in the ChatGPT Store built on peer-reviewed behavioral science and a curated network of credentialed advisors, a category that until today has been served, on ChatGPT specifically, only by a single competing product using web-search scraping rather than a vetted advisor network.

Consumers can now meet Couplr AI on the AI platform they already use and start a conversation about how to choose the right financial advisor for their life, with no lead form, no geographic gate, and no minimum asset threshold required to receive genuinely useful information.

“Consumers don’t wake up thinking, ‘I need to visit a financial services directory today,’” said Derek J. Notman, CFP®, Founder & CEO of Couplr. “They wake up asking their favorite AI a question. Meeting them where the question is being asked, with a matching model grounded in behavioral compatibility rather than zip code or net worth, is how advisor-client fit becomes possible at scale for the first time. This is a fundamental shift in how the profession will be discovered."

The Couplr matching engine uses 1,300+ behavioral variables to understand a variety of dimensions of advisor-client compatibility: things like specialization, communication style, and values alignment. The methodology is grounded in peer-reviewed research on trust development, advisor-client fit, and behavioral compatibility including published work from Dr. Meghaan Lurtz, PhD, Couplr's Chief Behavioral Officer.

"For decades, the industry has treated finding a financial advisor as a numbers problem, solved by matching more people to more advisors, faster," said Dr. Lurtz. "The research says something different. What predicts whether a working relationship will hold up is behavioral compatibility: how people think, decide, communicate, trust, plan, and take action. It's not the numbers game. It's the match game."

About the Deployments

Couplr AI is now discoverable on:

- ChatGPT Store: "Find A Financial Advisor - By Couplr," available to any ChatGPT user at chatgpt.com/g/g-6a4bc426883081919eb2d1dcf9c4d87a.
- Poe: Running on Anthropic's Claude Sonnet 4.6 model at poe.com/FindFinancialAdvisor.
- Meta AI Studio: Discoverable inside Meta AI on Instagram, Messenger, and WhatsApp under the name "Couplr AI."
- Grok: Available at grok.com/project/67248eb3-b851-497a-9989-bed43a7b46a8.

Consumers can also access Couplr's free matching quiz directly at app.couplr.ai/find-financial-advisor. The quiz takes approximately three minutes and requires no email address to try.

Industry Context

Consumer discovery of financial advice is undergoing a structural shift toward AI platforms. According to a 2025 T3/Inside Information report, 42% of financial advisors were already using generative AI in their businesses. Consumer adoption of AI tools for financial questions is moving faster than professional adoption, a gap that has, until now, left consumers with generic AI-generated financial information rather than a path to a suitable human advisor.

The Couplr deployment across four AI platforms in a single day is designed to close that gap by embedding a behavioral-compatibility matching model directly into the AI experiences consumers already use.

Recent Recognition

On June 11, 2026, Couplr was recognized as "Most Likely to Change the Industry" at the 2026 MassChallenge FinTech Program Finale in Boston. Couplr was selected for the MassChallenge FinTech program in February 2026.

About Couplr

Couplr, Inc. is the smart advisor–client matching platform for wealth management and insurance firms. Built on a 1,300-variable matching engine and enriched with InterGen Data and a National Data Partner intelligence, Couplr operates as precision growth intelligence for enterprise insurance and wealth firms. The platform combines two engines; Demand Anticipation, which converts consumer-initiated web traffic into qualified advisor meetings, and Couplr IQ, which surfaces 20–40% of held-away assets and prioritizes the top 15% of clients ready to act. Couplr is SOC 2 Type II compliant, integrated with Wealthbox and Redtail, and was recognized as “Most Likely to Change the Industry” at the 2026 MassChallenge FinTech Finale. Founded by Derek Notman, CFP®. Learn more at couplr.ai.

Read More
Full launch story on the Couplr blog: couplr.ai/couplr-ai-now-on-chatgpt-poe-meta-ai-grok/

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