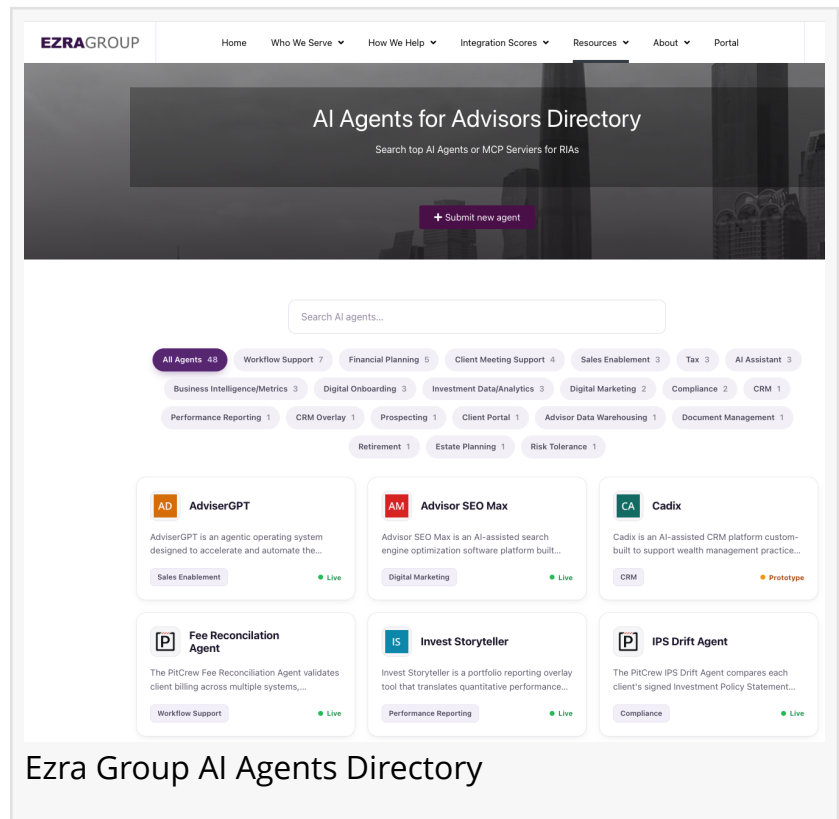


Ezra Group Launches AI Agents Directory for Financial Advisors

Independent catalog helps wealth management firms discover, compare, and evaluate AI agents

CHERRY HILL, NJ, UNITED STATES, July 21, 2026 /EINPresswire.com/ -- [Ezra Group](#) launched the [AI Agents Directory for Financial Advisors](#), a comprehensive directory of AI agents built specifically for wealth management firms. As software vendors rapidly introduce solutions for advisors, operations, compliance, client service, marketing, and investment management, the directory provides the industry's first independent resource for navigating this rapidly emerging category.



AI agents are rapidly emerging as a new category of wealth management software, with vendors introducing specialized solutions for nearly every advisor and operational workflow. Unlike AI assistants that primarily answer questions or generate content, AI agents autonomously execute multi-step workflows, interact with business systems, and complete tasks with minimal human intervention. As adoption accelerates, wealth management firms need an objective source to discover, compare, and evaluate the growing range of available solutions.

The searchable catalog includes AI agents from both established wealthtech providers and emerging startups. Each listing is classified by the business function it performs, the audience it serves, and a standardized description of its capabilities, making it easy for firms to discover, compare, and evaluate solutions across vendors. This helps firms quickly identify solutions that address specific operational challenges without having to navigate dozens of vendor websites or marketing presentations.

The directory is free to use and vendors may submit new agents for inclusion at no cost. Ezra Group does not charge listing fees, sell preferred placement, or rank vendors based on commercial relationships. The directory follows the same vendor-neutral principles as the



Every wealth management firm is being pitched AI agents. We created the AI Agents Directory for Financial Advisors to give the industry an independent view of this rapidly evolving market."

*Craig Iskowitz, Founder & CEO,
Ezra Group*

AdvisorTech Map, which Ezra Group co-publishes with Michael Kitces.

"Every wealth management firm we talk to is being pitched AI agents, and every vendor claims to have the best solution," said Craig Iskowitz, Founder and CEO of Ezra Group. "We created the AI Agents Directory for Financial Advisors to give the industry an independent view of the market. Firms should be able to see what's available, understand what each agent actually does, and compare solutions side by side."

"Our role is to be a trusted resource, not to influence

purchasing decisions," Iskowitz added. "The more transparent the information, the better decisions firms can make."

The AI Agents Directory for Financial Advisors is available at <https://ezragroup.com/ai-agents-directory/>. Vendors can submit AI agents using the Submit New Agent button on the directory home page. Ezra Group will continuously update the directory as the market evolves.

About Ezra Group

Ezra Group is a wealthtech consulting firm that advises broker-dealers, RIAs, asset managers, custodians, and fintech providers on technology strategy, AI adoption, platform selection, systems integration, and digital transformation. The firm produces proprietary industry research, including the WealthTech Integration Score, which independently evaluates software integration capabilities across technology vendors. Ezra Group co-publishes the AdvisorTech Map with Michael Kitces and also produces the WealthTech Today blog and podcast.

Hannah Morgan

Ezra Group

media@ezragroup.com

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