AdvisorPilot™ Launches AI-Powered Client Engagement Platform Built for Financial Advisors

New platform brings AI-driven efficiency to financial professionals. Advisors spend less time managing processes, more time delivering meaningful client advice.

WALNUT CREEK, CA, UNITED STATES, July 23, 2026 /EINPresswire.com/ -- AdvisorPilot™ today announced the official launch of its AI-powered portfolio review and client engagement platform designed for Independent Registered Investment Advisors (RIAs), Wealth Management Firms, and Financial Professionals.

Built by practicing advisors, AdvisorPilot™ was created to address one of the most significant challenges facing the financial services industry: the growing operational demands placed on advisors. From gathering client information and preparing reviews to creating customized deliverables, advisors often spend valuable time managing processes instead of focusing on client relationships.

AdvisorPilot™ combines statement analysis, portfolio insights, client communications, and workflow management into one integrated platform designed to help advisors create more efficient and consistent client experiences at their very first meeting.

“AI will not replace financial advisors. It will empower the advisors of the future. We built AdvisorPilot™ because we experienced firsthand the frustration of spending more time dealing with fragmented systems than helping clients. Advisors should spend their time where it matters most: building relationships and delivering advice. AdvisorPilot™ gives that time back.”- Christopher Perussina, Founder & CEO of AdvisorPilot™

Redefining the Advisor Workflow

AdvisorPilot™ transforms how financial professionals prepare, engage, and serve their clients through four core capabilities:

Statement Intelligence

AdvisorPilot™ analyzes client statements and documents to extract portfolio information, organize holdings, categorize account types, and identify potential portfolio considerations before an advisor begins their review.

AI-Powered Portfolio Insights

The platform helps advisors evaluate portfolio allocation, diversification, concentration risks, fees, and strategy alignment while generating customized meeting preparation materials, talking points, and client narratives. Advisors can also analyze retirement income strategies, Roth conversion scenarios, and annuity contracts within the platform.

Compliance-Ready Client Deliverables

AdvisorPilot™ helps advisors create meeting summaries, client reports, and follow-up communications while maintaining advisor oversight and control. Firms can maintain consistent branding, disclosures, and review processes across client interactions.

Integrated CRM & Client Workflow

AdvisorPilot™ connects client information, communications, tasks, and portfolio insights into one streamlined experience. The platform helps advisors organize client interactions, maintain follow-up workflows, and deliver a more personalized experience. Through the proprietary FlightDeck™ feature, advisors can transform client data and advisor direction into customized presentations, reports, and management insights in seconds.

Built to Scale the Advisor, Not Replace the Advisor

The future of financial advice will not be defined by replacing advisors with technology. It will be defined by giving advisors better tools to serve their clients.

By reducing time spent on repetitive administrative tasks, AdvisorPilot™ helps financial professionals increase capacity, improve client engagement, and deliver a more consistent advisory experience without sacrificing the relationships at the center of financial planning.

AdvisorPilot™ is currently onboarding select independent RIAs, financial advisors, and wealth management firms.

To explore AdvisorPilot™, view a product demonstration, or request access, visit www.AdvisorPilot.ai.

About AdvisorPilot™

AdvisorPilot™ is a client engagement and portfolio review platform built by advisors for advisors. The platform connects client information, portfolio analysis, reporting, and workflow management into one streamlined system, helping financial professionals deliver a more effective client experience.

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