Datalign Advisory Named 2026 Wealthies Finalist for AI-Powered Prospect Intelligence and Advisor Growth Platform

Recognized in AI: Marketing & Lead Generation (RelationshipAI) and Innovation Platforms. Datalign has referred $80B+ in assets to 13,000+ fiduciary advisors.

CAMBRIDGE, MA, UNITED STATES, August 3, 2026 /EINPresswire.com/ -- Datalign Advisory, the AI-native organic growth platform for wealth management, today announced it has been named a Finalist in the 2026 Wealth Management Industry Awards (the "Wealthies") in two categories:

- Technology Providers – AI: Marketing and Lead Generation for RelationshipAI, its AI-powered prospect intelligence platform
- Technology Providers – Innovation Platforms for Datalign's AI-Native Growth Platform for Wealth Management

RELATIONSHIPAI: SOLVING THE COLD START PROBLEM IN ADVISOR LEAD GENERATION
One of the most persistent challenges in financial advisor lead generation is the "cold start" problem: an advisor receives a qualified lead but has no context to make that first conversation meaningful. RelationshipAI solves this by delivering a personalized, one-page prospect briefing before the first call, synthesizing 300+ data fields from Datalign's proprietary knowledge graph of 200+ million Americans into four human-centered categories:

- Conversation Starters & Communication Preferences
- Demographic Details & Professional Background
- Wealth Indicators & Money-in-Motion Events
- Lifestyle Interests & Behavioral Signals

The results speak for themselves:

- Leads with a RelationshipAI briefing result in a 16% mid-funnel conversion uplift resulting in more opportunities created.
- Strongest gains in the Mass Affluent segment: +8.33%, where pre-call context helps advisors decide how and whether to pursue a lead
- 10+ hours saved per week previously spent on manual prospect research (early estimates)

"RelationshipAI helps us better understand consumers and anticipate their potential needs before a conversation even begins. This enables us to guide discussions more effectively, deliver a more personalized experience, and connect each individual with the advisor best suited to their needs, " said Chad Webb, Vice President of Growth Operations, Modern Wealth Management.

Bill Harris, Founder and CEO of Evergreen Wealth (and former CEO of PayPal and Intuit), on Relationship AI:
"Relationship AI surfaces additional context that advisors simply wouldn't have access to otherwise. It's not just faster research; it's deeper insight. That's what turns a first call into a real relationship."

AI-NATIVE GROWTH PLATFORM: FULL-STACK INTELLIGENCE FOR RIA CLIENT ACQUISITION
The Innovation Platforms recognition reflects Datalign's broader evolution from a financial advisor matching service into a connected suite of end-to-end AI solutions purpose-built for organic growth. Where most wealthtech AI addresses a single point in the advisor workflow, Datalign's platform covers the entire growth cycle: GEOsAI identifies the highest-opportunity markets for advisor expansion using AI-driven geographic targeting; Leads surfaces the best and highest-intent consumers through machine learning models trained on a knowledge graph of 200+ million Americans; RelationshipAI delivers personalized prospect intelligence briefings so advisors arrive at every first call prepared to build trust immediately; and Constellation, Datalign's agentic AI platform, enables firms to deploy custom, branded AI agents directly in client-facing interactions and Halo, Datalign's comprehensive consumer wealth management platform, which connects Americans with fiduciary financial guidance through an intuitive AI experience — think Perplexity for wealth management — coordinating a suite of specialized agents across tax, retirement, investing, and more. — all within a compliance-by-design framework built to meet or exceed SEC requirements.

Since launching in 2022, the platform has:

- Referred over $80 billion in assets to 13,000+ vetted fiduciary advisors across all 50 states
- Nearly doubled referred asset volume year-over-year in 2025, with $35B+ in assets referred
- Launched four AI solutions for RIAs—GeosAI, Constellation and Relationship AI—and opened an early beta for Halo AI, its consumer-facing platform
- Served more than 100,000 consumers seeking access to fiduciary financial advice
- Achieved an 86% present on the 2025 Barron's Top RIA list among platform advisors

With the launch of Constellation in March of 2026, Datalign's custom Agentic AI infrastructure to the broader wealth management industry, Datalign aims to enable independent RIAs and advisory firms of any size to deploy custom, branded AI agents grounded in their own investment philosophy, content, and client data. All agents operate within a compliance-by-design framework purpose-built to meet or exceed SEC requirements. This marks the first time smaller advisory firms have had access to the same institutional-grade agentic AI capability as the largest wirehouses.

“Being recognized in two Wealthies AI categories reflects what our platform is actually doing for advisors and the consumers they serve. Our goal has always been to give advisors a big easy button: the intelligence and tools to grow however they please, while giving consumers a clear path to the fiduciary financial guidance they need. AI in wealth management shouldn’t just automate back-office tasks. It should strengthen the human relationships at the core of this business.” - Satayan Mahajan, CEO, Datalign Advisory

ABOUT THE 2026 WEALTHIES
Now in its 12th year, the Wealth Management Industry Awards (widely known as the “Wealthies”) spotlight the companies and leaders shaping the future of financial advice, wealthtech, investment solutions, and advisor growth. A panel of top industry judges, led by Wealth Management Director of Editorial Strategy and Operations David Armstrong, chose the finalists. Winners will be announced at a gala in New York City on September 10, 2026.

“The scale and quality of this year’s nominations reflect an industry that continues to evolve at an extraordinary pace. What stood out to our judges was not just product innovation, but the growing sophistication around how firms are helping advisors operate, communicate, personalize advice, and build sustainable businesses.” (David Armstrong, Managing Director of Editorial and Content Strategies, Wealth Management Group at Informa)

ABOUT DATALIGN ADVISORY
Datalign Advisory is the AI-native organic growth platform for the wealth management industry. Built on a proprietary knowledge graph of 200+ million Americans, Datalign helps consumers find fiduciary financial advisors and gives those advisors AI-powered tools to find, understand, and convert the right clients at scale.

Learn more about Datalign Advisory at http://datalign.com
Learn more about Wealthies at https://informaconnect.com/wealth-management-industry-awards/

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