



Arete Wealth Goes Live on Arcus Edge™, Completing Its Full-Stack AI-First WealthTech Transformation

Broker-Dealer, RIA, and Insurance Firm Adopted All Three Arcus Edge Layers — Finity360, SYNTHIFY, and ArcusX AI — Over a Multi-Year Rollout

YARDLEY, PA, UNITED STATES, August 4, 2026 /EINPresswire.com/ -- [Arcus Partners®](#), an AI-first wealth management technology firm and Salesforce ISV and AWS Technical Partner, today announced that [Arete Wealth](#), a full-service Broker-Dealer, Registered Investment Advisor, and Insurance firm, has gone fully live on [Arcus Edge™](#), Arcus's unified WealthTech Intelligence Platform.

Arete Wealth's path to Arcus Edge reflects the platform's architecture in practice: Finity360™ first, to standardize the client experience layer across documents, forms, and account operations; SYNTHIFY™ next, to unify Arete's data foundation across CRM, custodians, and client systems; and now ArcusX AI™, the agentic intelligence layer that acts on that foundation to execute Arete's operational workflows.

This Arcus Edge implementation supports Arete Wealth's continued investment in technology to advance and improve the advisor experience and client engagement to drive operational efficiency and scalable growth to power the firm's expansion of its national wealth management platform.

"Arete didn't adopt a platform — they built one, layer by layer, over three years," said Gerry Murphy, CEO and Partner, Arcus Partners®. "That sequence is exactly how Arcus Edge is designed to work. You get the client experience right, you get the data right, and only then does the AI layer have something real to act on. Arete's rollout is the model for what 'AI-first' should mean in this industry."

For Arete Wealth, that sequencing wasn't incidental — it reflects a deliberate philosophy from the firm's own technology leadership.

"At Arete Wealth, we feel technology should strengthen relationships and not complicate them. Rolling out Finity360, SYNTHIFY, and now ArcusX AI over several years allowed us to thoughtfully modernize our platform while keeping our focus exactly where it belongs: helping advisors serve clients more efficiently, more consistently, and at scale," said Casey Cotton, Chief Technology Officer, Arete Wealth. "Now that we're on the full Arcus Edge platform, our advisors get a

consistent experience, and our operations team gets real efficiency without compromising the standards clients expect from our firm.”

About Arete Wealth

Arete Wealth is a premier wealth management and financial services firm delivering comprehensive broker-dealer and registered investment advisory solutions through institutional, full-service advisor, and technology-enabled channels. With an integrated platform spanning wealth planning, asset management, alternative investments, insurance, and capital markets capabilities, Arete Wealth serves as a trusted partner to financial advisors and high-net-worth clients across the United States.

About Arcus Partners®

Arcus Partners® is an AI-first wealth management technology firm and Salesforce ISV and AWS Technical Partner headquartered in Philadelphia, PA. The company builds and operates Arcus Edge™ — a unified WealthTech Intelligence Platform comprising SYNTHIFY™ (data intelligence), ArcusX AI™ (agentic intelligence), and Finity360™ (client experience) — purpose-built for independent RIAs, wealth management firms, and boutique broker-dealers.

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