



Producers Prospect and AdvisorPilot Announce Partnership to Bring AI Native Client Engagement App to Financial Advisors

Collaboration combines Producers Prospect's industry reach with AdvisorPilot's AI platform—purpose built to accelerate AI adoption by Financial Advisors.

WALNUT CREEK, CA, UNITED STATES, September 8, 2026 /EINPresswire.com/ -- Producers Prospect and AdvisorPilot today announced a strategic partnership to bring advanced artificial intelligence and workflow technology to [financial advisors](#) seeking to increase productivity, strengthen client engagement, and accelerate practice growth. Rather than adapting generic AI technology to wealth management, AdvisorPilot™ was designed around the real-world workflows advisors use to prospect, analyze portfolios, prepare for meetings, conduct client reviews, and identify new opportunities.

Through the partnership, Producers Prospect will introduce

AdvisorPilot(TM) to its nationwide network of financial professionals looking for practical ways to incorporate AI into their practices while preserving the personalized advice and relationships at the center of successful wealth management.

"Advisors are hearing about AI everywhere, but the real opportunity is turning AI into a practical business advantage," said Marc Rogers, Founder of Producers Prospect. "AdvisorPilot(TM) stands apart because it was developed around the way financial advisors actually work. We believe this partnership can help advisors operate more efficiently while delivering an even stronger client experience."

PRODUCERS
— PROSPECT —



AdvisorPilot

— ANALYZE. INSIGHT. ADVISE. GROW. —

AI Designed Around the Advisor

Financial advisors face increasing demands to deliver sophisticated, highly personalized advice while simultaneously managing time for prospecting, portfolio analysis, client reviews, meeting preparation, and business development. Built around a modular AI Architecture, AdvisorPilot(TM) is designed to reduce that burden by as much as 70%.

“Artificial intelligence should enhance the advisor-client relationship, not replace it,” said Christopher Perussina, Founder and CEO. “AdvisorPilot(TM) was created from the advisor’s perspective because we understand firsthand how much time goes into preparing for prospects and clients. Our objective is to give advisors an intelligent co-pilot that helps them identify opportunities faster, communicate more effectively, and expand their capacity to serve clients.”

Combining Advisor Technology With Industry Reach

The partnership combines Producers Prospect’s relationships within the financial services industry with AdvisorPilot’s advisor-focused technology.

AdvisorPilot(TM) can support financial professionals across multiple stages of the client lifecycle, including prospect intelligence, portfolio analysis, meeting preparation, opportunity identification, ongoing client reviews, integrated CRM, and practice growth.

The Advisor, Empowered by AI

As artificial intelligence continues to transform financial services, Producers Prospect and AdvisorPilot share the belief that technology should amplify—not diminish—the role of the financial advisor.

“The future of wealth management isn't AI versus the financial advisor,” added Jett Winter, Co-founder and Chairman of AdvisorPilot. “It is the financial advisor empowered by AI. When technology accelerates analysis and preparation, advisors can devote more time to what their clients value most: judgement, advice, experience, and personal relationships.”

About Producers Prospect

Producers Prospect provides thousands of financial professionals across the US with unmatched white-glove concierge resources, solutions, and business development opportunities designed to support independent advisors’ practice growth and enhance advisor productivity.

About AdvisorPilot

AdvisorPilot(TM) is an AI native client engagement, purpose-built for financial advisors. The end-to-end application helps financial professionals analyze portfolios, uncover actionable insights,

prepare for prospect and client conversations, enhance ongoing reviews, leverage AI in its integrated CRM, and create greater capacity for practice growth.

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