Milemarker Launches Firm MCP, Giving Wealth Management Firms Their Own AI Foundation Across Every System They Use

Live today with 300+ features, Firm MCP brings every system a firm runs into one governed AI layer, including legacy platforms without modern APIs.

CHARLESTON, SC, UNITED STATES, September 22, 2026 /EINPresswire.com/ -- Milemarker, the Snowflake-native data platform for wealth management, today launched Milemarker Firm MCP, a foundational Model Context Protocol server that gives an advisory firm one governed AI connection across all of its data. Firm MCP includes more than 300 features covering data exploration, reporting, entitlements, data governance, workflows and application building. It draws on the 140+ custodians, CRMs, portfolio systems and planning tools already integrated with Milemarker, and on the older systems most firms still depend on.

> “Firm MCP brings all of it into one foundation that knows how you define a household, who is allowed to see what, and what your numbers mean.”
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> *Jud Mackrill, Co-Founder and CEO, Milemarker*

The launch comes as software providers across the industry release MCP connectors of their own. Last week, Anthropic introduced Claude for Financial Advisors with connectors from Charles Schwab, Orion, Envestnet, Addepar, Zocks, Wealthbox and others. Each vendor connector gives an AI assistant a clear view into one system. Firm MCP gives the firm a view across its entire business, built on its own definitions, its own permissions and its own data environment.

That includes the systems that will likely never get a connector. Many firms rely on older portfolio accounting platforms, in-house databases, spreadsheets and file-based feeds that may never offer a robust API, let alone an MCP. Milemarker brings that data in through secure file transfer, direct data sharing and email ingestion, reconciles it with everything else the firm runs, and makes it available through Firm MCP. Legacy systems are instantly modernized and work side by side with the industry's best modern platforms in the same conversation.

"Vendor MCPs are great news for advisors, and firms should connect every one they rely on," said Jud Mackrill, co-founder and CEO of Milemarker. "Every firm also runs systems that will never ship an API, and those systems still hold data the business depends on. Firm MCP brings

all of it into one foundation that knows how you define a household, who is allowed to see what, and what your numbers mean. That foundation belongs to the firm. And it's live right now. Our clients are using all of it today, with no queue, and it's changing how their teams work this week."

From rollout to everyday operations

Milemarker introduced its MCP server in May 2026 as a rollout to partner firms. Firm MCP marks the next stage. Every Milemarker client firm has access to all 300+ features today, with no waitlist and no rollout queue, and client teams are putting it to work daily. Operations leaders describe the reconciled revenue view, fee forecast, client health score or leadership dashboard they need, and Firm MCP builds it against the firm's real data the same day the question is asked. Work that used to sit in an engineering queue now gets done by the people who understand the business best.

What Firm MCP gives a firm

One firm, one connection. Firm MCP maps data from every connected source into shared canonical records for households, accounts and advisors, with identity resolution across systems. When someone asks a question, the answer comes from reconciled firm data.

Legacy systems, instantly AI-ready. Systems without modern APIs or MCPs join the same governed layer as the firm's newest platforms, so a question can span a decades-old accounting system and a modern custodian in one answer.

Permissions that travel with every prompt. Role-based row access policies follow each user into every conversation, so advisors, operations staff and executives see only what they are entitled to see.

Governance built in. Firms can tag and describe data across their catalog and apply PII masking. Firm MCP reads and builds without altering a firm's underlying source data, security-affecting changes run as a dry run first, and every platform change requires confirmation before it executes.

Build from a conversation. Teams can create and deploy dashboards and metrics, pages, forms, workflows, custom objects, search and Navigator AI agents directly from an AI assistant, inside the Milemarker platform their firm already uses.

Model choice. Firm MCP works with Claude, ChatGPT, Codex, Gemini and other MCP-compatible clients, and the firm's data remains in its own Milemarker Snowflake environment.

What firms are saying

"Custodians, CRMs and meeting tools are all opening up through MCP, and that gives my teams

real leverage. What makes it work at firm scale is having our own layer underneath, one place where our data and our definitions live together. That's a real moat for advisory firms. Milemarker Firm MCP is the layer we're building that on at RFG, so what we ship fits the way our advisors actually work."
— Dr. Jordan Hutchison, Vice President of Technology and Operations, RFG Advisory

"Every new AI tool used to mean another system to govern. Milemarker's Firm MCP gives Root one foundation across every system we run, with our permissions already in place. Our operations team can build what they need the same day, and compliance has one place to oversee it."
Alex Stickelman, Chief Operating Officer and Chief Compliance Officer, Root Financial

"The sophisticated advisory teams we partner with come to Elevation Point from different starting points—some as established RIAs with technology stacks built over time, and others breaking away from a wirehouse and starting fresh. We think about our technology ecosystem much like an App Store, pairing institutional-quality infrastructure with best-in-class solutions that fit how each firm does business and serves its clients. Milemarker and its MCP help bring that ecosystem together, connecting data across CRM, reporting, planning and other systems into one consistent, permission-aware view. That means we can go beyond giving advisors a complete picture of their clients to surface what matters, explain why it matters and identify what to do next. That shift from connected data to actionable intelligence is where the real value lies."
— Jordan Feurer, Managing Director, Platform Operations, Elevation Point

"I know what the data is. I know what it should be. I know where it lives and what number we're trying to get to. I used to write out the whole recipe, hand it to an engineer and wait for someone to get to my report. With the Milemarker MCP, I just do it myself, across every system we run, with our permissions already in place. It's been magic for me."
— Ann Bomgren, Head of Operations, Advisor Wealth Management

Availability

Milemarker Firm MCP is available now to every Milemarker client firm, with full access to all 300+ features. Firms can see it working against real data at Milemarker's MCP Open Office Hours, held every other week. Learn more at milemarker.co/mcp.

About Milemarker

Milemarker is a Snowflake-native data infrastructure platform for wealth management, serving RIAs, broker-dealers, family offices and TAMPs. With 140+ wealth management integrations, the Navigator AI layer and Milemarker Firm MCP, Milemarker unifies a firm's data, from its newest platforms to its oldest systems, so its people and its AI can work from a single source of truth. Learn more at milemarker.co.

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