Sightline Wealth Management LP selects Buckler for Investment Due Diligence

Sightline has deployed Buckler's AI platform to support investment due diligence processes and enable advisor teams to scale the investment review processes.

TORONTO, ONTARIO, CANADA, September 16, 2026 /EINPresswire.com/ -- Buckler, an AI-powered investment due diligence platform that reads the fundamentals behind every security a firm holds, today announced that Sightline Wealth Management, an independent wealth management firm serving individuals, families and foundations, has adopted Buckler's platform to support its investment due diligence process.

The partnership reflects an industry challenge Buckler was built to solve. AI tools that summarize investments quickly are easy to find. AI tools that ground every conclusion in primary source data, and show exactly where that conclusion came from, are not. Sightline's advisors leverage Buckler to bring together current, primary-source data on securities, weighted against a defined set of peers or alternatives, and maintain documented, point-in-time analysis supporting their investment reviews.

Buckler's President and CEO, Richard Owen states, “Sightline wanted to deploy a scalable, consistent and efficient investment review process - exactly what Buckler was developed to do."

Oded Orgil, CEO of Sightline Wealth Management further highlights, “Buckler gives our advisors more time to focus on their clients while supporting a rigorous and consistent investment review process. It brings relevant information together efficiently and helps us maintain a contemporaneous record of the analysis supporting our reviews.”

What the Partnership Delivers

- Using Buckler, investment reviews draw on current, primary-source data - earnings, disclosures, fund holdings - rather than a summary that reads well but can't be traced back to where it came from.
- Securities can be assessed against a reasonable set of alternatives or peers, providing advisors

with additional information to consider as part of their investment analysis.
- Investment reviews can be documented in writing, with a rationale, at the point the decision is made - a defensible record, not a reconstruction after the fact.
- The platform supports a consistent review framework across Sightline's advisors, while preserving the advisor’s judgement and responsibility for specific recommendations.
- By reducing the manual work involved in gathering and organizing investment information, Buckler allows advisors to devote more time to analysis, planning, and client relationships.

Why Primary Data Matters Now

Canadian wealth firms face rising expectations on product oversight and cost transparency. Know Your Product obligations require firms to understand, and be able to demonstrate they understand, the risks, costs and reasonable alternatives for every product they recommend.

Buckler was built on the view that AI-assisted due diligence only holds up if it's grounded in verifiable, primary-source data rather than a plausible-sounding output. Firms that build their review process on that foundation meet the rising standard as a consequence of how they work, not as a reaction to a new rule, and

About Buckler

Buckler is an AI-powered investment due diligence platform built on primary data, serving wealth management firms and banks. Founded in 2024 by a team with broad experience across technology, AI, market data, design, and the day-to-day work of investment advisors, Buckler builds on a simple premise: the process is the product. Rather than generating plausible-sounding conclusions, Buckler grounds every review in verifiable, primary-source data, so the output isn't just an answer, but a defensible, documented process behind it. Learn more at buckler.ai

About Sightline Wealth Management

Sightline Wealth Management LP is an independent Toronto-based wealth management firm serving individuals, families and foundations who want to build and preserve their wealth. The firm provides personalized financial planning and investment advice, institutional-quality asset allocation, and access to both traditional and alternative asset classes through fee-based and transactional account options. Sightline is a member of the Canadian Investment Regulatory Organization (CIRO); client accounts are protected by the Canadian Investor Protection Fund (CIPF) within specified limits. Learn more at sightlinewealthmanagement.com.

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