Pravar AI Launches Wealth OS to Bring White-Glove Service to Every Client

Pravar for Advisors prepares advisors to act before the client asks, deepening relationships and winning a larger share of each family's wealth.

NEW YORK, NY, UNITED STATES, September 30, 2026 /EINPresswire.com/ -- Pravar AI today launched the Pravar Wealth OS and its first product, Pravar for Advisors, built to give every client on an advisor's book the proactive attention most firms can now afford only for their largest relationships. Clients served this way give their advisor more of their trust and, over time, more of their wealth.

Advisors ration their best service because they must. The top tier of a full book gets anticipation and planning; the rest get a quarterly review. Pravar starts from a different question: what would every relationship in the book look like if the advisor had the time to anticipate each one?

The cost of that rationing is rising. Cerulli Associates finds that only 27 percent of heirs expecting a share of the more than $120 trillion set to change hands over the next 25 years plan to keep their benefactor's advisor, yet just 16 percent of wealth firms have put an AI agent into production, according to the 2026 WealthStack Study.

Pravar for Advisors reads across each family's accounts, holdings, activity and history to build a working picture of each relationship. It flags the moments where a timely conversation changes the outcome, such as an upcoming liquidity event, assets held at another firm, early signs that a client is pulling away, or an heir who has never met the firm. For each, the advisor sees what has changed, why it matters to that family and what to do next, with the follow-up already prepared. The client experiences an advisor who calls first. The firm sees it in retention, consolidated assets and relationships that carry into the next generation.

Governance built into the platform

The Wealth OS runs on each RIA's own intelligence: its investment views, planning philosophy, policies and voice, so every outreach reflects how the firm thinks and stays within its rules. A continuous evaluation layer, Pravar's own intellectual property, screens personal data, scores every interaction for quality and routes anything below threshold to human review. Every action leaves an audit record. The Wealth OS sits above the CRM, custodial and planning systems a firm already runs, so nothing needs replacing. The system builds memory of each relationship over time, so its picture of every family grows richer with use. Firms can add capabilities on the same foundation without buying another tool.

Ayon Banerjee, Co-founder and CEO of Pravar AI, said: "Every advisor can name the twenty clients who get their very best work. The rest of the book gets what time allows, and that is where a firm's next stage of growth is sitting. We built Pravar on a governed platform because in this industry, an AI that cannot explain itself cannot be used."

Hans-Paul Bürkner, former Chairman and CEO of BCG and a member of Pravar's Executive Advisory Board, said: "Wealth management runs on trust, and trust has always been limited by how many relationships one advisor can truly know. That limit is now lifting. The firms that pull ahead will be the ones that bring the care they give their largest clients to every family they serve, with governance those families can rely on."

Michael Boardman, a wealth management executive who has held senior leadership roles at J.P. Morgan, HSBC, U.S. Bank and Schwab/U.S. Trust, and an advisor to Pravar, said: "The RIAs that win the next decade will grow on two fronts at once, winning new clients while going deeper with the families they already serve. That means an experience that feels personal at every touchpoint and a real relationship with the next generation before the wealth changes hands rather than after. Few firms have the people to do that for every client. Pravar AI is designed to give advisors that reach."

Availability
Pravar for Advisors is available now to RIAs and wealth management firms in the United States and India.

About Pravar AI
Pravar AI builds the governed AI operating system for wealth and asset management firms. It was founded by CEO Ayon Banerjee, who has spent more than 30 years in technology, and Malavika Lakireddy, an enterprise product leader who has built large-scale products for regulated industries across Silicon Valley and India. Its Executive Advisory Board includes former BCG leaders Hans-Paul Bürkner and Arindam Bhattacharya. Pravar operates out of New York and Bengaluru.

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This press release can be viewed online at: https://www.einpresswire.com/article/946085547

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