

Connecticut Wealth Management Selects Subatomic to Build Its AI Operating System

A secure, observable operating system built on CTWM's own data and the way the firm works, not generic AI.

FARMINGTON, CT, UNITED STATES, October 14, 2026 /EINPresswire.com/ -- Connecticut Wealth Management (CTWM), an independent registered investment advisor serving more than 1,300 client families, has hired Subatomic in a five-year partnership to build the firm's [AI Operating System](#).

The system unifies CTWM's data, learns how the firm works, and puts an AI Chief of Staff and a staff of AI Co-Workers to work across the firm, supervised by its people.

CTWM maintains a 35-to-1 client-to-advisor ratio. Experience has taught the firm that clients could not receive the level of service and holistic financial planning they have come to expect from CTWM if that ratio sat closer to the 150- or 200-to-1 ratios many in the industry use. CTWM chose Subatomic precisely because of how important technology is to continuing to deliver on the promise it has made to its clients over the years.

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Sam Sova, Co-Founder and CEO, Subatomic

“With a mission to turn life's aspirations into reality for our

clients and team, we must continually evolve,” said Kevin C. Leahy, Founder, President and CEO of Connecticut Wealth Management. “We believe that at this moment in time, technology could be truly transformative for our industry and our firm. Once we recognized the true potential, partnering with Subatomic was the obvious path. They understand our industry, our firm, and the incredible efficiencies that can be gained; and have modeled a technology shift that will truly be industry leading.”

A new operating system. CTWM's software stack has grown as its clients' needs have grown more complex, and using it now takes subject-matter expertise across multiple platforms. The first



priority is the work around client meetings: meetings prepped from one unified view, follow-up emails drafted afterward, and calls that pull up the client's profile and turn into follow-up tasks. That gives the team meaningful time back to be even more thorough, thoughtful and strategic in the advice they give clients.

CTWM's way, not generic AI. CTWM wants to stay in control of its own destiny: how it views and uses its client data, and the insights that data provides. Subatomic IQ encodes how CTWM works, so the firm can customize its own workflows and put the most critical information directly in front of its team.

"Everyone in wealth management is buying AI. CTWM chose to hire it," said Sam Sova, Co-Founder and CEO of Subatomic. "Kevin's team didn't need another login. They needed capacity without giving up the way CTWM works. The models will change. The applications will change. CTWM's data, intelligence and way of working remain its own."

"Most AI in this industry sits on one system and answers questions within its limited purview and client understanding," said Karl Simon, Co-Founder and CTO of Subatomic. "The result is a messy, fragile and unfaithful understanding of the client. Subatomic delivers an irreplaceable foundation that ensures a repeatably accurate client representation, with a unified view across data and intelligence. With Deep Lens keeping a clear, observable record of what was done and why, firms gain the confidence to hand work over to their AI Co-Workers."

The first phase is scheduled to go live for CTWM's advisors and client service team before the end of 2026, with additional phases to follow across the firm.

About Connecticut Wealth Management

Connecticut Wealth Management, LLC is a registered investment advisor that believes in creating genuine partnerships, building trust and understanding with clients in order to provide unbiased financial planning and asset management to individuals across Connecticut and nationwide. Registration with the SEC does not imply a certain level of skill or training and does not imply the endorsement or approval of the qualifications of Connecticut Wealth Management and its representatives. Connecticut Wealth Management takes pride in employing an independent business model that aligns our interests with those of our clients, and engages in a collaborative, team approach to creating empowering wealth management strategies and solutions. Connecticut Wealth Management is a Hartford Business Journal (HBJ) 2026 Best Places to Work in Connecticut Award Winner. For more information about Connecticut Wealth Management, visit www.CTWealthMgmt.com.

About Subatomic

Subatomic builds the AI Operating System that lets a firm hire AI instead of buying more software. Learn more at www.getsubatomic.ai.

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