

What Advisors Really Think About AI in Wealth Management

Janet King

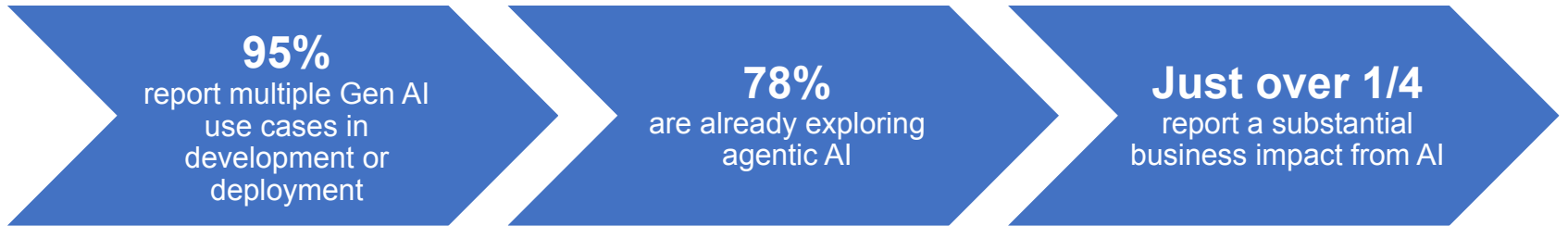
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AI adoption in wealth management is accelerating but strategy and ROI often lag

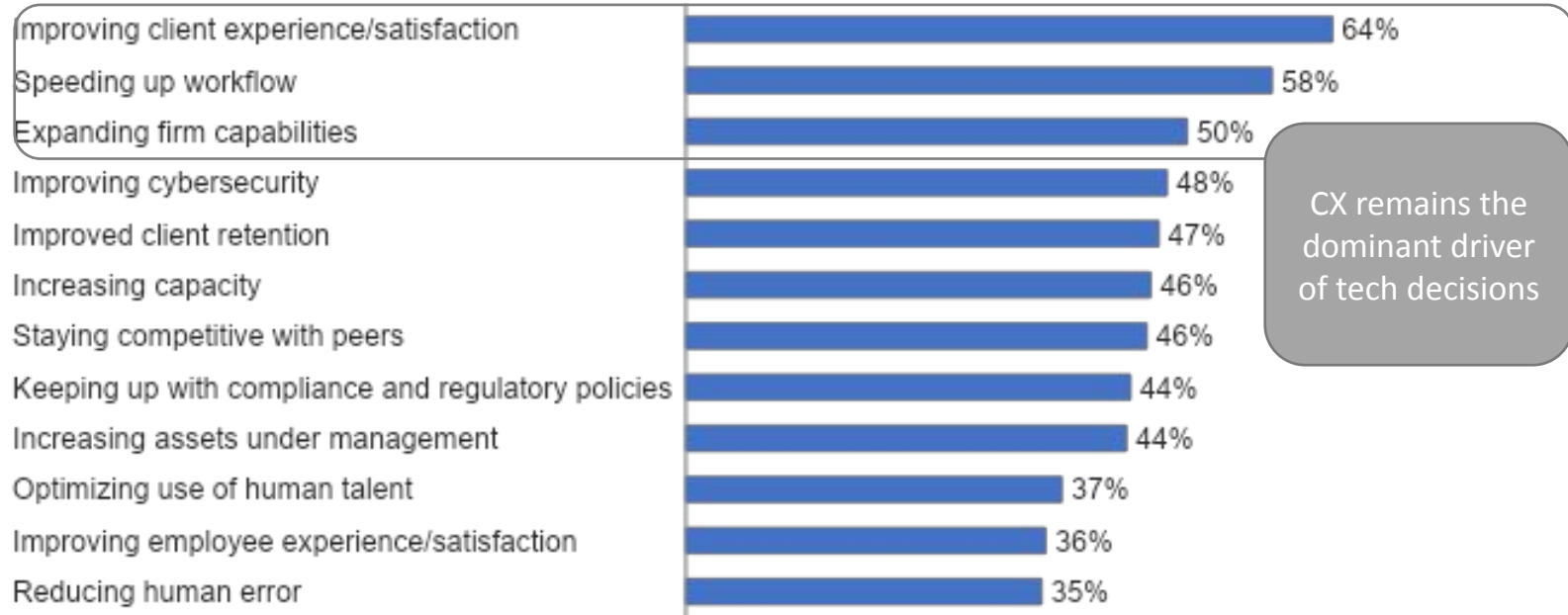


Source: Gen AI in Wealth Management, EY, 2025

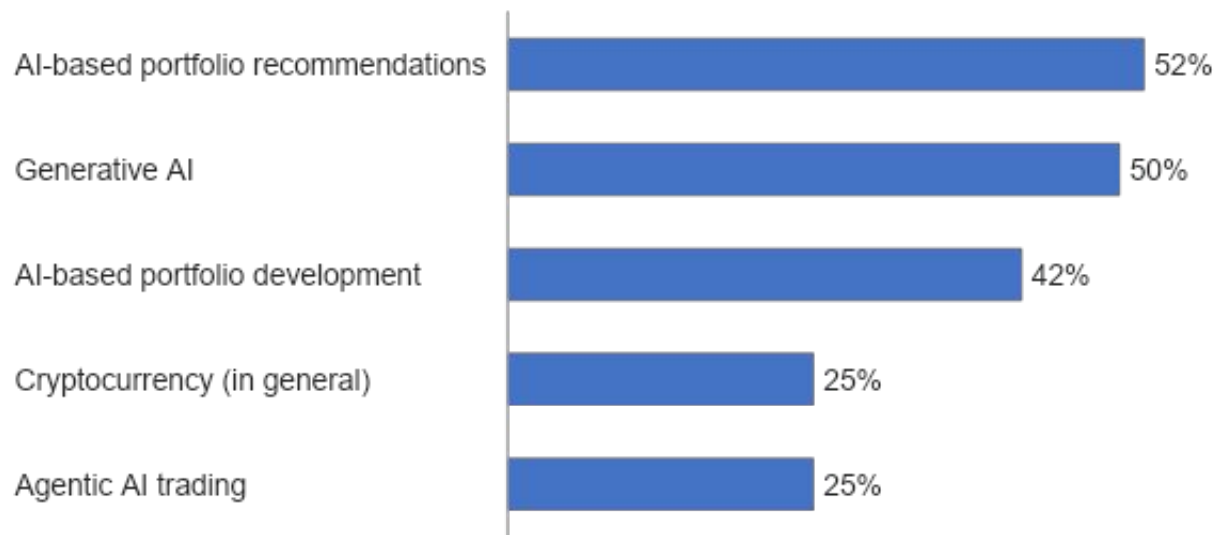
We will explore 3 questions:

- Where advisors are actually using AI today
- Where they remain hesitant and why
- What separates firms experimenting with AI from those building real strategy

What goals are driving technology strategy at your organization right now? (Top 10)



What technologies or technology trends do you think will change financial planning and wealth management the most in the coming year? (Top 5)



Is AI being used in the following areas of your firm?

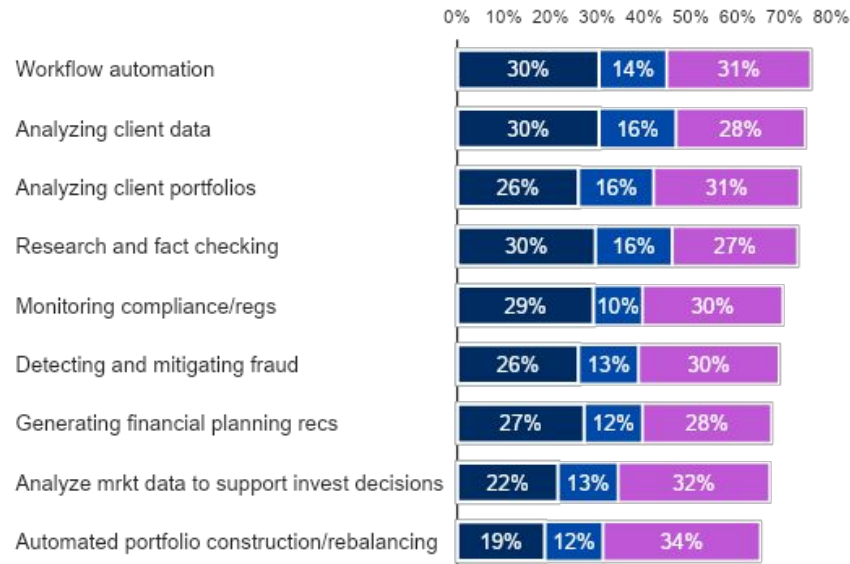
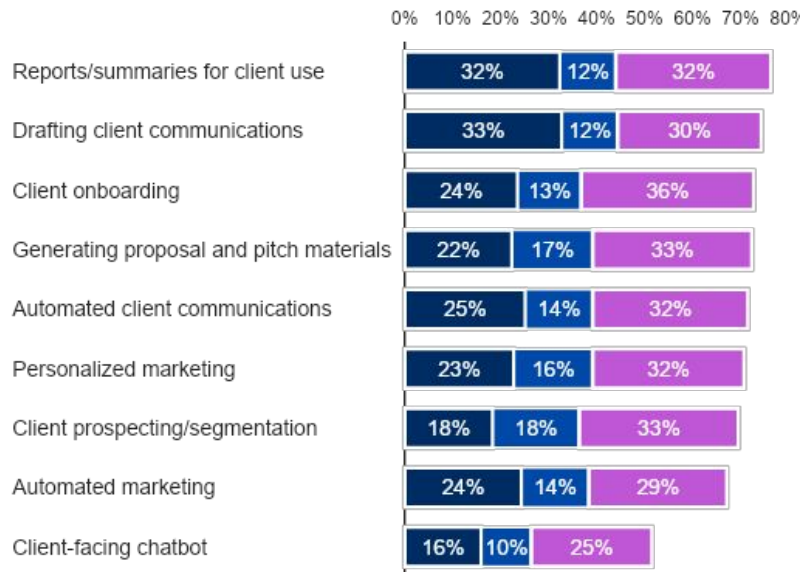
Client Acquisition, Onboarding and Client Communications and Marketing

Internal Efficiencies, Investment and Portfolio Management, and Risk Management

■ Yes and it's delivering benefits

■ Yes but we're not seeing benefits yet

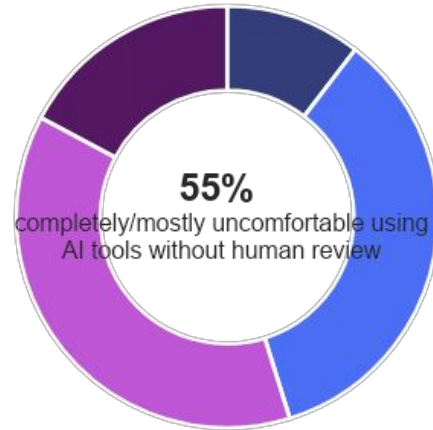
■ No but we're exploring it



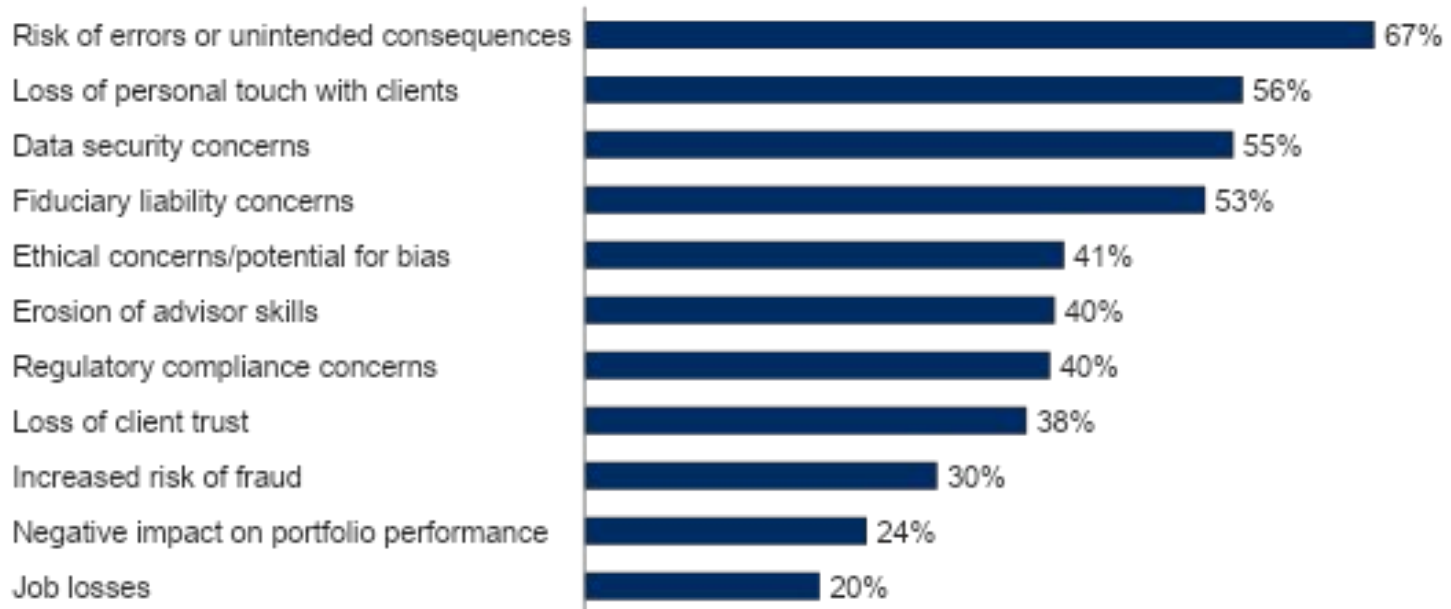
How would you rate the risk to your organization associated with advisors using AI to help guide investment decisions?



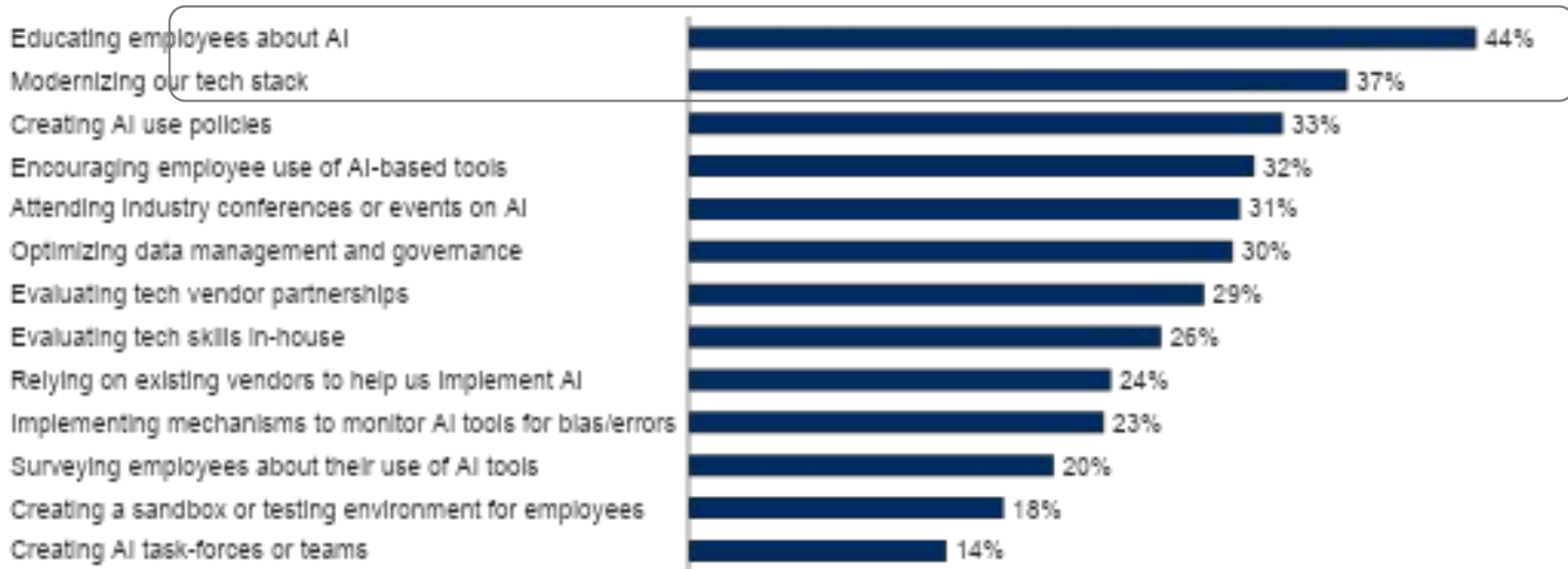
How comfortable would you be using AI tools that autonomously make investment decisions or rebalance client portfolios without human review?



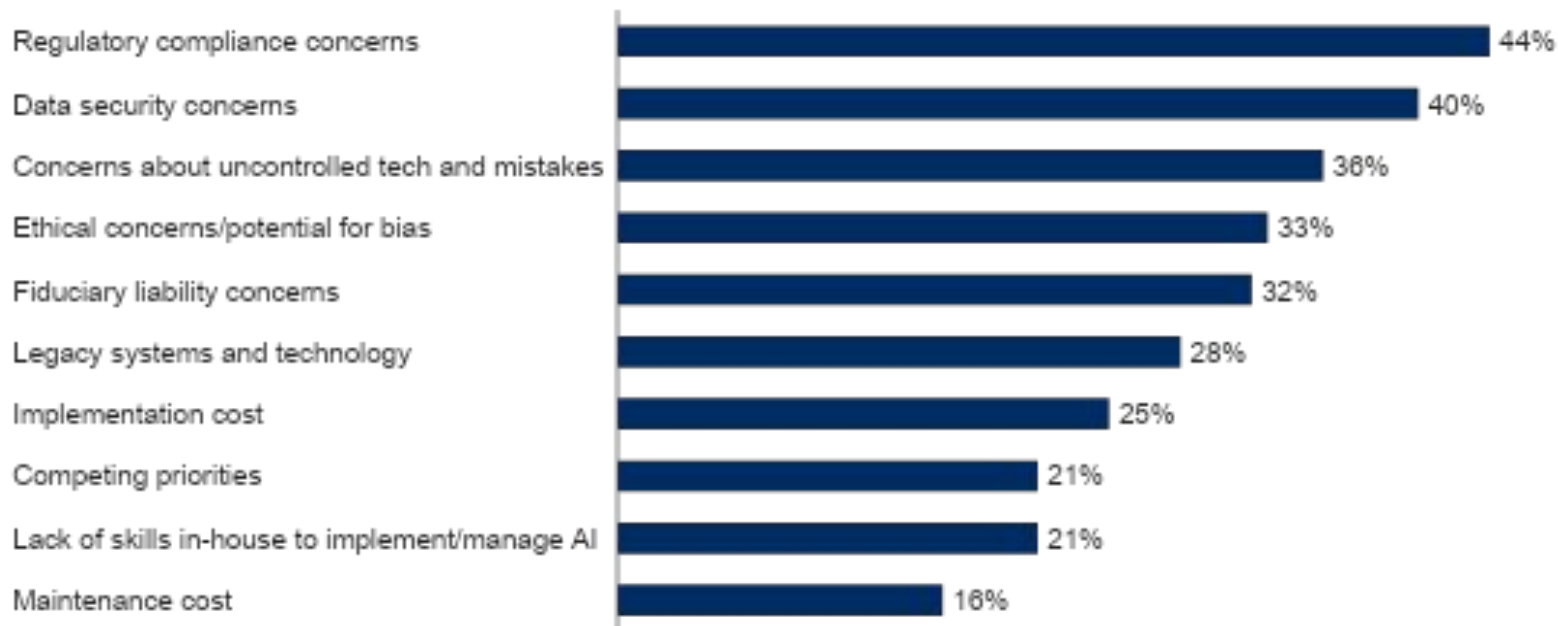
What are the biggest risks to the broader financial planning industry of incorporating AI technologies?



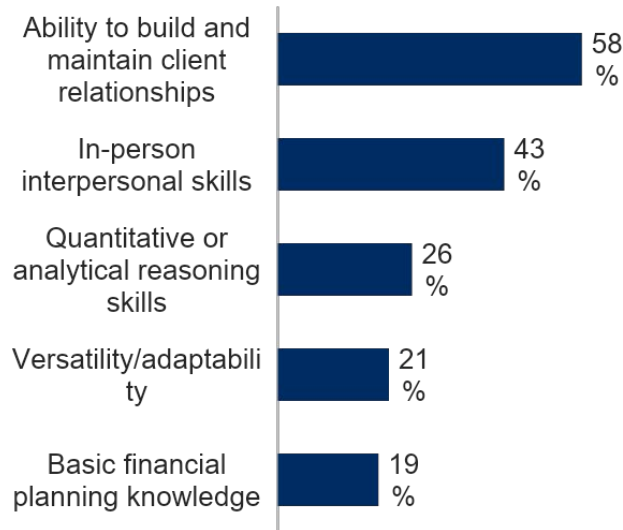
What, if anything, is your company doing to be more AI ready?



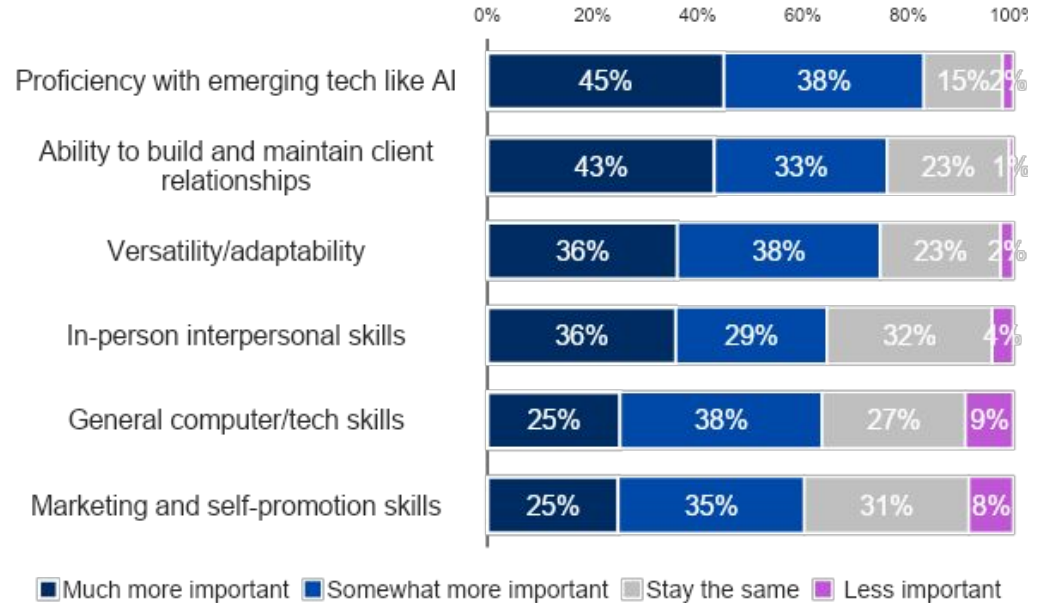
What's holding your company back from further implementation of AI technology? (Top 10)



What skills are most needed to be successful in your role today? (Top 5)



How will the importance of these skills for advisors change over the next 3-5 years as AI becomes more capable and widely used?



3 takeaways:

1. AI adoption in wealth management is accelerating but uneven
2. Risk and trust remain central concerns
3. Leading firms will treat AI as a strategic capability

Thank you!

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