ProSyft

Home Blogs

Wealth Management

Automated Briefings. Personalised Insights.

Problem

Wealth managers are expected to deliver high-touch, personalized service — but legacy workflows make that hard to scale.

01. Reports are manually assembled from Excel, CRM tools, and research decks

02. Charts, commentary, and insights are built one by one

03. Market updates are often delayed and time-consuming

04. Advisors spend more time preparing materials than speaking with clients

05. Valuable insights often remain buried in siloed documents

Our Solution

ProSyft embeds an agentic AI engine — EVIE — directly into your environment to automate client reporting, commentary, and insights generation, all tailored to your tone, structure, and branding.

01. Seamlessly connects to Excel, SharePoint, CRM tools, and investment systems

02. Auto-generates reports, PowerPoints, and PDFs per client or segment

03. Runs securely behind your firewall to ensure data privacy and regulatory compliance

04. Interprets benchmarks, product exposure, and trends at scale using Excel AI and knowledge graphs

Key Benefits

For Wealth Managers:

More Time with Clients – Spend less time on formatting and more on relationships

Real-Time Market Updates – Deliver timely insights, not outdated information

Personalized at Scale – Tailor outputs for each client without increasing headcount

Audit-Ready & Compliant – Maintain full traceability, version control, and regulatory alignment

Seamless Integration – Works with Excel, PowerPoint, Word, and SharePoint — no workflow disruption

Enhanced Productivity – Empower RMs and support teams with less manual prep

Ready to Dive Deeper?

We're here to help you explore our solutions and answer any questions.

Contact Us

Email: sales@prosyft.com

Registration No.: 15714615