

NEWS

For Immediate Release

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The Oasis Group Releases AI WealthTech Map as Resource for Wealth Management Firms

Artificial intelligence map identifies and categorizes 55 AI-focused firms serving the wealth management industry

MONROE TOWNSHIP, NJ (July 17, 2024) – [The Oasis Group](#), a leading consultancy for the wealth management industry, today released their [AI WealthTech Map](#), a resource that financial advisors and wealth management firms can use to discover leading artificial intelligence solutions and AI-focused firms serving the wealth management industry.

“In the fast-evolving landscape of wealth management, artificial intelligence is poised to be the next game-changer,” said John O’Connell, founder and CEO of The Oasis Group. “It promises not just incremental improvements but a profound transformation of how wealth management firms operate, attract clients, and deliver services.”

The Oasis Group identified 55 leading technology firms that specifically serve the financial services industry for inclusion in the map. The firms are not existing wealthtech solutions that are developing AI capabilities – these firms are AI first and were built to support the wealth management industry. The map follows the sales cycle of a wealth manager by starting with prospecting, followed by writing assistants, note takers, proposal generation, AI assistants, investment research, next best action, and compliance solutions – categorizing each of the solutions and providing all the tools that a financial advisor would need to convert a prospect into a client as efficiently as possible.

“Wealth management firms can unlock new levels of efficiency, personalization, and client engagement by adopting AI,” added O’Connell. “We strongly recommend that firms begin to leverage AI to gain familiarity with its capabilities and concerns, to learn new skills like prompt

engineering, and to clearly identify how they plan to leverage AI in projects. Leveraging AI now enables firms to discuss their compliance posture and to develop their AI policies. The future of wealth management is here, and it's powered by artificial intelligence.”

To access the AI WealthTech Map from The Oasis Group’s Vantage Point, [please click here](#).

THE OASIS GROUP NAMED A FINALIST IN THE 2024 WEALTH MANAGEMENT INDUSTRY AWARDS

Additionally, The Oasis Group was named a finalist in the [2024 WealthManagement.com Industry Awards](#) – an annual competition and industry-leading awards program often referred to as ‘The Wealthies’.

The Oasis Group was named a finalist in the Technology Disruptors category thanks to their Cybersecurity Assessment Services, where CEO John O’Connell works closely with firms to understand the technology they use to run their firms and provides recommendations for improving their tech stack and cybersecurity efforts. The Oasis Group’s enhanced cybersecurity assessment services include a 56-point checklist, where the team delivers a comprehensive cybersecurity assessment that evaluates where the firm stands today and what can be done to improve its cybersecurity posture in the future.

For the tenth year this September, *WealthManagement.com* will honor the best companies, individuals, and organizations that support financial advisor success at its annual Industry Awards. This year's winners, chosen by an independent panel of industry judges, will be announced on September 5th at a black-tie gala at the Ziegfeld Ballroom in New York City.

To see the full list of finalists and to learn more about the 2024 *WealthManagement.com* Industry Awards, [please click here](#). To learn more about the 2024 Industry Awards gala and activities, [please click here](#).

ABOUT THE OASIS GROUP

The Oasis Group is a leading consultancy in the wealth management industry, helping wealth management and financial technology firms create and focus on their unique value proposition to attract advisors and clients, and ultimately generate higher revenue. The Oasis Group offers award-winning consulting services, industry-leading research, and compelling on-demand training for wealth management firms and the service providers who serve the wealth management industry. With extensive leadership experience in both emerging businesses and mature, established organizations, founder John O’Connell and his team are passionate about helping financial services and technology firms solve their most complex technology and sales challenges, helping clients stay focused on their growth, generate more revenue through great sales processes, build fantastic products by understanding the market and competition, and provide amazing service to their customers and clients. To learn more about The Oasis Group, visit www.TheOasisGrp.com.

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