



Advisors & Technology

2025 Connected

Wealth Report

A survey of 300 financial advisors revealing how technology is shaping the future of wealth management—and where it's falling short.

Welcome

Across the wealth management landscape leaders are navigating a common challenge—how to guide their firms through a key inflection point. Technology, particularly advancements in artificial intelligence (AI), is transforming how financial advisors across the wealth management industry engage with clients, manage their practices, and make decisions. At Advisor360°, we see this as a moment of profound opportunity—not just for efficiency gains, but for using innovation to redefine the advisor-client relationship in ways that build trust, deepen connections, and create sustainable growth.

AI's promise is immense. It fuels predictive analytics to anticipate client needs, helps advisors uncover risks and opportunities, and automates routine tasks so advisors can focus on strategy and relationship building. It even takes approved “next steps,” such as scheduling meetings or crafting personalized follow-ups. Yet, the true power of AI lies in its ability to amplify—not replace—human expertise. Our research shows that successful firms will embrace AI as a co-pilot, elevating the craft of advising and the client experience.

Our research highlights the urgency of leaning into digital transformation—of which AI is a defining feature today. Advisors are asking for capabilities that are intuitive, integrated, and impactful. They want technology that simplifies complexity, whether through better data quality, enhanced client transparency, or AI-driven insights. Firms that respond to these needs by acting decisively will stand out—to both advisors and their clients—as innovators that lead the market.

This report offers a roadmap for what's next in our industry in AI and beyond. It explores the technology challenges advisors face and the solutions that can help bridge the gap between today's capabilities and tomorrow's possibilities. I invite you to engage with it and think boldly. Together, we can create an ecosystem that empowers advisors, delights clients, and redefines success in wealth management.



Warm regards,

Darren Tedesco
President, Advisor360°

 [@darrentedesco](#)

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Research Concept

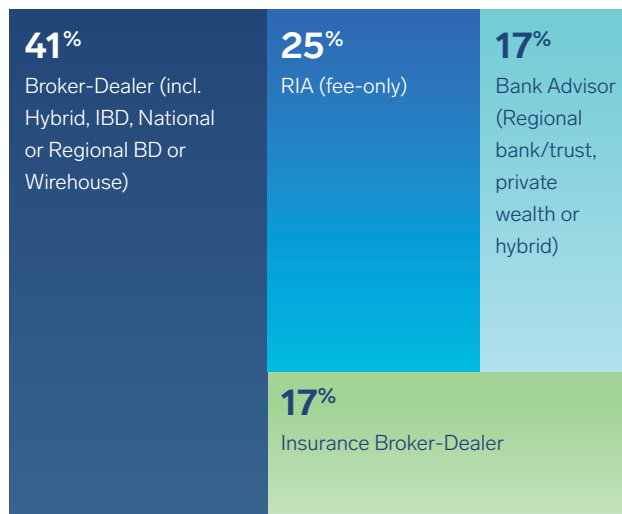
Advisor360° surveyed 300 financial advisors at enterprise wealth management firms in the U.S. to better understand their perspective on how technology impacts the way they conduct business. Responses were collected via a telephone- and email-based survey of 300 U.S. financial advisors fielded during September and October 2024. Survey participants self-identified as being responsible for managing, on average, \$2 billion in assets – individually or as part of a team – and hailed from firms with an average AUM of \$103 billion.

The survey was conducted by Coleman Parkes Research on behalf of Advisor360°. Advisor360° and Coleman Parkes are separate and unaffiliated organizations.

Survey respondents

Figure 0.1

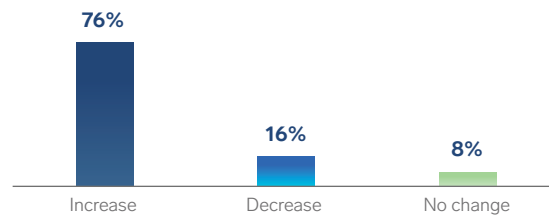
FIRM TYPE



JOB ROLE



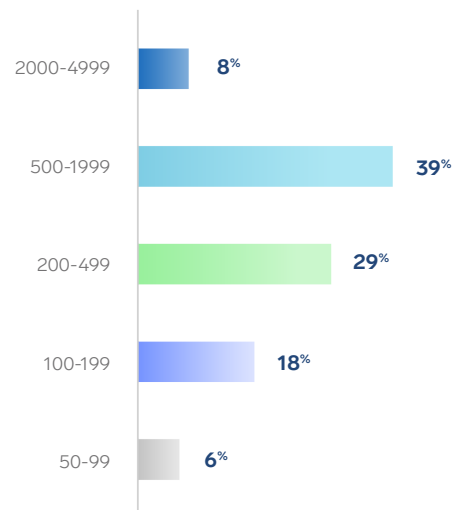
INFLOW OF NEW CLIENT ASSETS IN LAST YEAR



Audience profile

Figure 0.2

AVERAGE ADVISOR HEADCOUNT



Advisors' average AUM:

\$2 billion

Average number of years as an advisor:

7 years

AVERAGE FIRM ASSETS

\$103 billion

Preface

The *2025 Connected Wealth Report* serves as a lens into the state of advisor technology in 2025 and a map of advisor sentiment. The increasing dissatisfaction with outdated systems highlights the growing urgency for innovation across key areas, including data integrity, system integration, and end-client tools. As our survey respondents make clear, technology has become more than a means to an end—it is the bridge between advisors and clients, enabling trust, agility, and meaningful engagement.

Readers will recognize a few key themes that cut across this research. First, the report reveals a striking sentiment among advisors—that outdated technology is more than an inconvenience, it's a barrier to growth. Moreover, the advisors surveyed make clear that the wealth management industry is witnessing a dynamic interplay between human expertise and emerging technologies like generative AI—and these radical advancements will unlock new levels of efficiency. Finally, firms that embrace technology as a differentiator will not only solve their current pain points but also redefine what it means to thrive in wealth management.

This report is part analysis of technological gaps in wealth management and part call to action for firms to reimagine their approach. By addressing foundational issues and embracing forward-thinking solutions, firms have the opportunity to attract and retain top talent, win new clients, and build a sustainable future. The insights gleaned from these pages can guide firms in leveraging technology as a strategic advantage in an era of rapid innovation and heightened expectations. As you read on, consider this: The future of wealth management belongs to those who prioritize innovation, empowerment, and adaptability. The time to act is now—firms that seize this moment to modernize will set the standard for the next generation of financial services.