

Client-Level Investment Account Data. Built for What's Next.

WealthTechs provides **premium client-level investment account data aggregation and delivery services** to advisors and fintechs globally, with more than **46,000 sources** in its ecosystem representing **over \$1 trillion in assets** — and delivers raw **bronze**, structured **silver**, and normalized and reconciled **gold** data to leading advisors and fintechs globally.

46,000+DATA SOURCES IN
ECOSYSTEM**\$1T+**

ASSETS REPRESENTED

30+ YearsINVESTMENT DATA
EXPERIENCE**500+**

CLIENT RELATIONSHIPS

WHAT WEALTHTECHS DOES

Controlled AI Data Services — Use client account data with AI without exposing client identity. PII is removed before data enters the AI environment, then results are securely reconnected to authorized client context.

Applications & Platforms — Data once, use everywhere. Client investment account data prepared once, for use across every application, platform and internal system — no source integration rebuilt for each one.

Data Lakes — Bring client-level data into Azure, AWS, Snowflake and Databricks. WealthTechs handles acquisition and preparation for a reliable investment-data foundation.

Analytics, Automation & Enterprise Operations — Prepare data for reporting, BI, analytics and workflows, or replace fragmented DIY integrations and legacy vendors with one modern data operation.

CHOOSE HOW FAR WEALTHTECHS GOES

Bronze

Source Data
Get the data from the source, preserved as-is, for teams that own their own transformation.

Silver

Prepared Data
Disparate sources standardized into a consistent structure, with source values preserved.

Gold

Normalized & Reconciled
WealthTechs or your data model — normalized, validated with 200+ checks.

Enterprise

Your Data Operation
Leverage what WealthTechs has built inside your own data operation — technology, expertise and people.

Own your data once. Modernize everything else on your terms.

Most firms still rely on custom integrations, legacy feeds and application-specific pipelines — expensive to build, difficult to maintain, and poorly suited for today's operational, analytical and AI-driven requirements. When data is coupled to the applications that consume it, modernizing reporting, performance, reconciliation, revenue management, compliance or analytics means rebuilding the data infrastructure too — creating cost, complexity, operational risk and vendor lock-in.

WealthTechs is the **independent data layer** between investment data sources and the applications that power financial services. It helps wealth managers, asset managers, fintechs and investment platforms aggregate, validate, reconcile and deliver client investment account data from hundreds of disparate sources into trusted, operationally reliable information — freeing firms to evolve their technology stack without rebuilding core data infrastructure or depending on a single software vendor.

About WealthTechs

WealthTechs provides a broad range of client-level investment account data services, tailored to what your business actually needs — from raw source data to fully reconciled, ready-to-use data for data lakes, applications and AI. Founded in 2010 by industry veteran Chris Casey.

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Free Pilot**
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