



THE NEXT-GENERATION ADVISOR:

How AI & Technology Are Redefining Value in Wealth Management

By Adam Blumenthal, Chief Growth Officer, OneSeven



Executive Summary

The wealth management industry is undergoing a fundamental transformation. While markets, products, and planning strategies remain important, the true differentiator for the next decade will be how effectively advisors leverage technology and artificial intelligence (AI).

For the next generation entering the field, the opportunity is not to replace experienced advisors—but to amplify them.

This paper outlines five core ways emerging advisors can use AI and technology to immediately create value inside established practices—enhancing client experience, accelerating growth, and increasing enterprise value.

Turning Data Into Insight: The Rise of the “Prepared Advisor”

The Shift

Clients no longer expect advisors to simply react—they expect them to anticipate.

The Opportunity

Next-generation advisors can leverage AI to synthesize vast amounts of data into actionable intelligence before every interaction.

Applications

- Pre-meeting AI briefings (client background, financial triggers, business insights)
- Identification of liquidity events, stock compensation, or estate planning needs
- Real-time scenario modeling and risk identification

Impact

Senior advisors enter every conversation with depth, context, and confidence, creating a more sophisticated client experience.

From Meetings to Momentum: Automating Intelligence Capture

The Shift

Advisors spend too much time documenting—and not enough time advising.

The Opportunity

AI enables the automatic capture and transformation of client conversations into structured, actionable outputs.

Applications

- Meeting transcription and summarization
- Automated follow-up task creation
- CRM updates and workflow triggers

Impact

Nothing gets missed. Execution improves. Advisors focus on relationships and strategy—not administration.

Scaling Trust: Personalized Client Experience at Scale

The Shift

Clients expect personalization—but most firms cannot deliver it consistently.

The Opportunity

AI allows advisors to deliver a “white-glove” experience across hundreds of relationships.

Applications

- Personalized client communications (emails, updates, life-event outreach)
- Customized market commentary tied to individual portfolios
- Proactive engagement based on life-stage triggers

Impact

Clients feel uniquely understood—without increasing advisor workload.



Building a Modern Growth Engine: From Referrals to Predictability

The Shift

Traditional growth models rely heavily on referrals, which are inconsistent and difficult to scale.

The Opportunity

Next-generation advisors can build digital-first growth engines powered by AI and automation.

Applications

- Content creation and distribution (social, email, video)
- Lead generation funnels (webinars, guides, landing pages)
- Data-driven prospect targeting and segmentation

Impact

Firms move from unpredictable growth to repeatable, scalable client acquisition.

From Practice to Enterprise: Driving Firm Valuation Through Technology

The Shift

The most valuable advisory firms are no longer just relationship-driven—they are system-driven.

The Opportunity

Technology enables firms to scale beyond individual advisors, increasing both growth rates and valuation multiples.

Applications

- Standardized workflows and client experiences
- KPI dashboards (growth rate, client acquisition cost, lifetime value)
- Scalable marketing and service infrastructure

Impact

Firms evolve from lifestyle practices into high-value enterprises, commanding significantly higher market multiples.

Key Takeaway for Emerging Advisors

The future of wealth management will not be defined by who knows the most—it will be defined by who can leverage technology to deliver better outcomes at scale.

Next-generation advisors have a unique advantage:

- You are digitally native
- You understand emerging tools
- You can implement faster than legacy systems can adapt

Your role is not to compete with experienced advisors—but to become their strategic advantage.

Conclusion

The firms that win in the next decade will not be those with the best products—but those with the best systems, insights, and client experiences.

AI and technology are no longer optional—they are foundational.

For students entering the profession, this represents a rare opportunity: To not just join a firm—but to transform it.



OneSeven

Ready to learn more? Let's Talk!

Schedule a time with me, Adam Blumenthal, Chief Growth Officer, to get answers to your questions on how AI and technology are redefining value in wealth management.



[OneSevenAdvisor.com](https://www.OneSevenAdvisor.com)



OneSeven is a registered investment adviser with the U.S. Securities and Exchange Commission (SEC). Registration with the SEC does not imply a certain level of skill or training. OneSeven only transacts business in states in which it is properly registered or is excluded or exempted from registration. A copy of OneSeven's current written disclosure brochure filed with the SEC, which discusses OneSeven's business practices, services, and fees, is available through the SEC's website at: www.adviserinfo.sec.gov.

OneSeven earned a spot on USA TODAY's List of Top Advisers in April of 2023, 2024, 2025, and 2026 based on a list compiled by market research firm, Statista. The list culled the list of investment advisers registered with the U.S. Securities and Exchange Commission down to the top 500 firms based on the growth of their assets under management over the short and long term, and recommendations from clients and peers. OneSeven did not participate in or pay to be included in the selection process.