




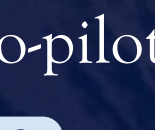




# The Oasis Group's Vantage Point - AI Wealth Technology - September 2024



## Prospecting

**aidentified**   
**TIFIN AG**   
**FINNY**   
**CATCHLIGHT**   
**LeadCenter.AI**   
**wealthfeed**   
**magnifi** 

## Writing Assistant

**AdvisorX AI**   
**Levitate**   
**Jasper**   
**WEALTH MANAGEMENT GPT**  
GIVING ADVISORS SUPERPOWERS 

## Note Taking - Wealth

**Zeplyn**   
**zocks**   
**Jump**   
**PULSE360**   
**paraplanner.ai**   
**mili**   
**FinMate AI**   
AI Assistant for Financial Advisors  
**Munin**   
**Note Taking - General**  
**Vega Minds**   
**zoom**   
**Umified.com**   
**sybill**   
**Read**   
**Ollie**   
Otter.ai  
**FATHOM**   
**COPILLOT**   
**Fireflies** 

## Proposal Generation

**Boosted.ai**   
**holistiplan**   
**LEA**   
**advisoryai**   
**CONQUEST**   
**YourStake**   
**fp alpha**   
**TIFIN WEALTH**   
**VRGL**   
**Powder** 

## AI Assistant/Co-pilot

**unblu**   
**ARQA**   
**saturn**   
**SAGE**   
**COGNICOR**   
**@Work**   
**Vega Minds**   
**Helix by HL**   
**A/Y/T**  
ALPINE YARDS TECHNOLOGIES 

## Investment Research

**QUANTCONNECT**   
**Datamaran**   
**10**   
**AlphaSense**   
**danelfin**   
smart investing made easy  
**TrendSpider**   
**Investment Management**  
**AR** 

## Next Best Action

**TIFIN AG**   
**ForwardLane**   
**Responsive**   
**BENTO ENGINE** 

## Portfolio Creation

**ALLINDEX**   
**Philanthropy**  
**TIFIN Give**   
**Data Aggregation**  
**collation.ai** 

## Compliance

**ARCHER**   
**REGVERSE**   
**air**   
**COMPLIFY**   
**Hadrius**   
**saiifr** 