

Future of AI-Powered Advisory

Current (2024)

- * Rule-based portfolios
- * Basic risk questionnaires
- * Automated rebalancing



Near-term (2025-2027)

- * LLM chat advisors
- * Behavioral nudges
- * Hyper-personalization



Future (2028+)

- * Autonomous AI agents
- * Holistic life planning
- * Real-time adaptation

Enabling Technologies:

- Large Language Models (GPT, Claude)
- Real-time data integration (open banking)
- Advanced ML for risk/return modeling
- Voice/multimodal interfaces