

The Future of WealthTech

AI Advisors

- * LLM chatbots
- * Personalized advice
- * Tax optimization

Embedded Investing

- * Super apps
- * Payroll investing
- * Shopping rewards

Tokenized Assets

- * Real estate tokens
- * Art/collectibles
- * 24/7 trading

Hyper-Personalization

- * Values-based
- * Tax situation
- * Life events

Financial Wellness

- * Holistic view
- * Debt + investing
- * Mental health

Global Access

- * Cross-border
- * Emerging markets
- * Stablecoin rails

Vision: Investing becomes invisible infrastructure woven into daily financial life