

Report *WealthTech total: 28*

Article	Date
WealthKernel , a UK-based digital wealth infrastructure provider, is planning its Series B for 2022, said Karan Shanmugarajah, CEO.	OCT 13, 2020
Boosted.ai , a Toronto, Canada-based creator of machine learning algorithms for portfolio managers, is receptive to investor approaches, said Nicholas Abe, CFO/COO and co-founder.	OCT 08, 2020
Tradeteq , a London-based provider of an electronic trading platform for trade finance assets, is evaluating the timing of its next capital raise, said Christoph Gugelmann, co-founder and CEO.	SEP 11, 2020
ABAKA , a London-based digital retirement solutions provider, will close on its Series B raise this year, said Fahd Rachidy, founder and CEO.	AUG 17, 2020
Franc , the creator of an investment app serving residents of South Africa, aims to raise an additional \$300,000 for its seed round. The company plans to start raising a Series A round at the end of next year or at the beginning of 2022.	AUG 07, 2020
CogniCor Technologies , the San Francisco-based AI digital assistant platform provider, has begun a fundraising round, said Sindhu Joseph, co-founder and CEO	AUG 06, 2020
Freetrade , a London-based challenger stockbroker that offers commission-free investing, could potentially raise its Series B towards the end of the year or in early 2021, said Viktor Nebehaj, co-founder and CMO.	AUG 04, 2020
Canopy (SG) , a Singapore-based financial data aggregation platform, is evaluating its next capital raise for US growth, Tanmai Sharma, CEO and founder.	JUL 28, 2020

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WealthConductor , a Hartford, Connecticut-based retirement income management platform provider, is seeking its next round of capital, said Sheryl O'Connor, CEO and co-founder.	MAY 28, 2020
Wealthinity , a London-based wealthtech start-up, will likely begin its Series A raise this fall, said Taras Rybak, CEO and co-founder.	MAY 21, 2020
Nucoro , the London-based provider of an AI-driven wealth management platform, may pursue its Series A round in early 2021, said Melanie Palmer, CMO.	JAN 14, 2020
d1g1t , a Toronto, Canada-based wealth management platform, is focused on its operations for the next six months, but come summer, it will begin investment discussions, said Dan Rosen, CEO.	JAN 13, 2020
Twilight , a NYC-based startup which is developing an app to help young people save for a down payment on their first home, is looking to raise its first round of funding, co-founders Darren Small (CEO) and Allyson Alves (CTO) told this news service.	JAN 10, 2020
Wizest , a Cleveland, Ohio-based startup which is offering a wealth management application to new investors, is soon planning to raise a seed round, CEO Axel Thibon told this news service.	DEC 27, 2019
Innovesta , the Tel Aviv-based company behind an AI-based Innodex platform which has a novel algorithm used to evaluate private company investment, expects to raise more capital in 2020 as it expands its investment decision-making platform to more family funds, accredited and non-accredited investors, said Keren Kay, co-founder and Chief Marketing Officer (CMO).	DEC 17, 2019
Elsen , a Boston, Massachusetts-based company that has created a platform that makes it easier for financial institutions to access both external and internal data for creating investment strategies, could become an attractive acquisition target if it demonstrates success in its market, said Zac Sheffer, CEO and co-founder.	OCT 28, 2019
Responsive AI , a Vancouver-based company that operates a direct to business model that relies on artificial intelligence (AI) to provide wealth managers at financial institutions with direct, actionable insights on individual client data, recently launched a \$5m second seed round to build on the \$1.1m it had raised previously, said Meaghan Dampsey, Head of Growth at Responsive AI.	OCT 01, 2019
Kawa Capital Management , an Aventura, Florida-based company that created a mobile app as a means for existing investors to track current deals and to learn of new, planned investments, has backed into FinTech and attracted new investors for deals because of its tech innovation.	JUN 28, 2019
OnPointe , a St. Joseph, Michigan-based company providing tools to financial services firms that help those firms effectively evaluate and communicate risks to their clients, may seek capital next year to advance its toolset, CTO Rob Harbin.	JUN 06, 2019
Tomorrow , a Seattle-based startup that has launched a mobile app letting anyone create a legal will, is now raising its Series A round, co-founder Josh Heckathorn told this news service.	APR 25, 2019

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StockQuanta , a New Jersey-based startup that uses distributed computing and real-time data science to help users select stocks and allocate wisely, is likely to need investors by July or August if everything goes according to plan, founder Ashish Gupta, told this news service.	APR 08, 2019
Emotomy , a San Francisco based startup that is using AI and ML to help asset managers reduce account churn, is approaching \$4bn in overall assets that utilize its technology, CEO Patrick Beaudan said.	APR 03, 2019
Galileo Processing , a Salt Lake City-based company with offerings in prepaid payment processing, fraud detection and decision-making analytics, is breaking away from processing and is eyeing new products in crypto & wealth, according to Clay Wilkes, founder & CEO.	APR 01, 2019
Tally , a San Francisco-based company that assists people and families in managing their debt, likely is funded until the middle of 2020 but plans to seek to more capital as it expands, according to Erica Dorfman, Head of Finance & Operations at the company.	MAR 29, 2019
Nummo , the Zurich, Switzerland-based designer of personal financial management software, is likely to pursue a Series A raise this year, CEO and co-founder Roi Tavor told this news service.	JAN 09, 2019
TradingView , the Chicago, Illinois-based company that has created a social network for traders and investors, expects to apply its recent \$37,000,000 venture round to assist international expansion, said co-founder and COO Stan Bokov. At the same time, the company's rapid organic growth is expected to continue, he added.	NOV 25, 2018
TribeVest , a Columbus, Ohio-based startup building an investment platform for small groups, is gearing up for a public launch in February, with decisions on raising capital to follow, CEO Travis Smith told this news service.	NOV 21, 2018
Mylo Financial , the Montreal-based creator of a financial application that helps people to invest, is in the process of raising a Series A round, according to a company source.	JUL 06, 2018