



CuvaWealth

The Cutting-Edge AI Agent for Wealth Management

CuvaWealth is a Wealth Management AI Agent developed by **Cuva AI**.
AlpsGen AI is our trusted implementation and customization partner.

Industry Pain Points in Wealth Management



Overwhelmed Advisors

Managing large client books with limited resources.



Rising Expectations

Clients demand personalized, on-demand service.



Compliance Pressure

Increasing regulatory demands and data overload.



Scaling Limitations

Growth requires proportional cost increases.



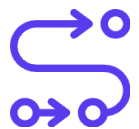
Meet CuvaWealth

AI agent purpose-built to meet modern wealth management needs



Purpose-Built

CuvaWealth is designed specifically to meet the unique needs of financial advisors and their clients.



Workflow Expansion

Evolves by adding new capabilities and adapting to organizational priorities.



Automation

Automates high-frequency tasks like reporting and client Q&A, freeing up valuable advisor time.



24/7 Personalization

Ensures continuous, personalized service across channels with intelligent responses.



Continuous Learning

Learns from every interaction to better serve clients and enhance decision-making support.



Real-Time Insights

Delivers timely intelligence to support more informed decisions.

Solving the Pain Points

Industry Pain Point

Wealth Manager AI Agent Solution

Overwhelmed advisors

Automates routine tasks like reporting and client queries

High demand for personalized service

Provides tailored, memory-enabled client interactions

Compliance pressure and data overload

Ensures secure, trackable, and compliant communication

Limited ability to scale cost-effectively

Operates 24/7 without requiring additional headcount

Intelligent Onboarding Workflows

CuvaWealth simplifies onboarding by automating client intake, regulatory steps, and early engagement.



KYC & Regulatory Compliance

Ensures complete, compliant documentation intake



Risk Profile Assessment

Tailors advice from the first interaction



Account Setup

Automates account opening and funding



Client Segmentation

Assigns optimal engagement journeys



Financial Planning Workflows

CuvaWealth enables dynamic, personalized financial plans aligned with goals, cash flow, and tax strategy.



Goal Setting & Simulation

Visualizes long-term outcomes for clients



Cash Flow Forecasting

Identifies and adjusts for liquidity needs

Investment Decision Workflows

CuvaWealth augments investment decisions with real-time insights, automation, and compliance controls.

Investment Idea Generation

Surfaces opportunities based on data and goals



Portfolio Rebalancing

Maintains alignment with risk profiles and targets



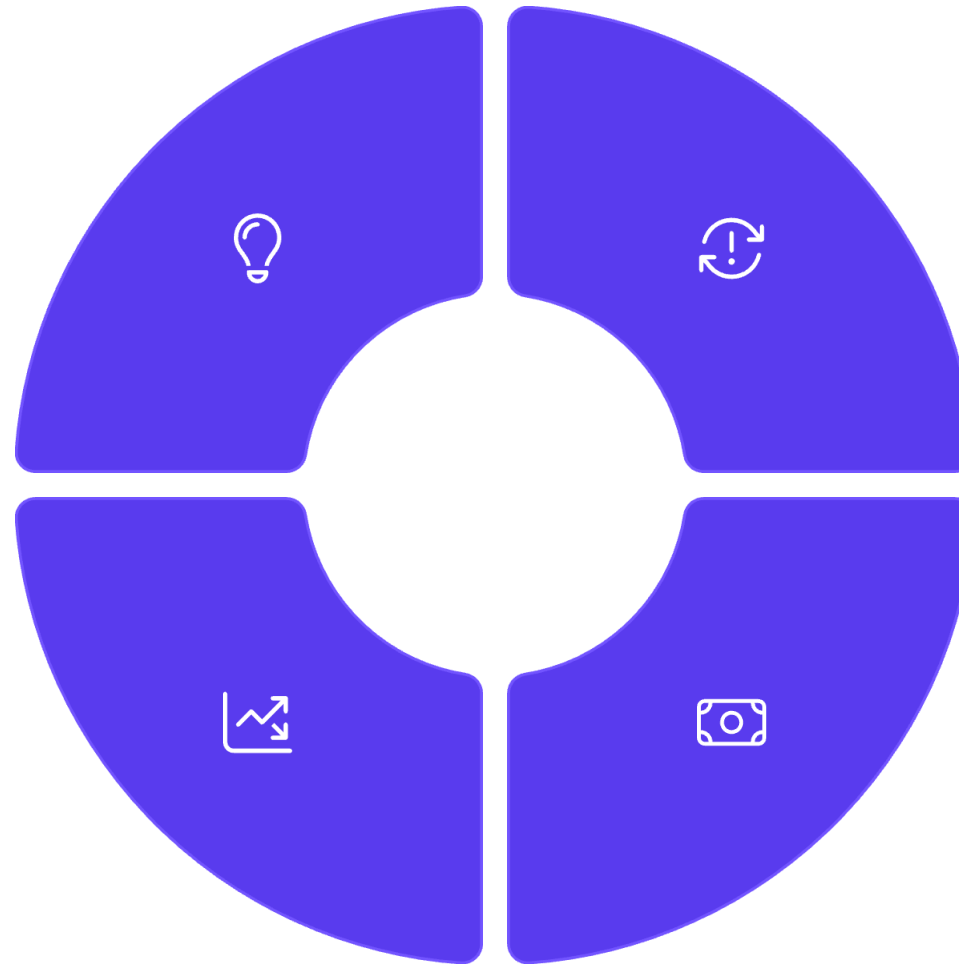
Buy-Sell Decision Support

Enhances execution quality with AI-driven context



Liquidity Planning

Improves fund allocation and opportunity capture



Client Reporting Workflows

CuvaWealth delivers transparent, consistent, and accessible reporting that enhances client trust.

Automated Report Generation

Saves time, ensures consistency

On-Demand Reporting via AI

Clients access answers without waiting

Performance Attribution

Clearly shows value and investment impact



Compliance & Risk Workflows

CuvaWealth ensures compliance through intelligent monitoring, alerts, and regulatory-ready records.

Dynamic Risk Profiling

Adjusts risk posture as conditions evolve

Audit Trail & Archiving

Ensures documentation for regulatory review

AML & KYC Triggers

Detects suspicious behavior instantly

Policy Breach Detection

Alerts for mandate or threshold violations



Business Impact

Real-World Benefits, Real Business Value

3x

Faster Onboarding

Automating data collection & setup

40%

Workload Reduction

Agents handle routine queries & tasks

40%

Conversion Boost

Increases lead conversion rates by **40%** with timely, relevant nudges

2.5x

Client Engagement

Accelerates onboarding by **2.5x** through automated intake and setup workflows

50%

Faster Compliance Processing

Real-time alerts & automated checks

35 %

Operational Savings

Lower costs through task automation

Why It Works So Well

Built for trust, precision, and results in high-stakes environments

State-of-the-art AI Platform

Full control over the stack, optimized for financial complexity



Secure & Enterprise-Ready

Built for compliance, auditability, and security standards

Self-Learning Agents

Agents evolve using integrated knowledge base and knowledge graphs



Agentic RAG Intelligence

Agents generate grounded, explainable responses from trusted sources

Hyper Productivity

Automates customer service, finance, back-office, compliance



Why Now?

The convergence of need, readiness, and opportunity in financial AI

Accelerating AI Adoption

wealth managers are rapidly embracing applied AI solutions

Fast Track to Transformation

Cuva AI delivers enterprise-grade AI, fast and practical



Evolving Client Expectations

Customers demand fast, intelligent digital services

Competitive Advantage

Forward wealth management firms scaling with speed, agility, and efficiency

Regulatory Complexity

AI enables smarter navigation of complex compliance demands

Let's Build the Future of Wealth Management Together

Discover how CuvaFin can deliver real business impact.



Schedule a Demo

See CuvaFin in action

[Schedule a demo](#)



Book a Strategy Session

Explore your specific needs

[Schedule a demo](#)



Sign Up

Begin your transformation journey

[Sign Up Now](#)

Let's Connect



Email Us

Reach our product team directly at product@cuva.ai



Call Us

USA: +1(415) 873-4150
UAE: +971 52 261 9983
EU: +46734481308



Visit Online

Explore our platform at www.cuva.ai

Our Global Presence



United States

Plug and Play Tech Center
440 N Wolfe Rd
Sunnyvale, CA 94085
United States



United Arab Emirates

IFZA Business Park, Building A1
Dubai Digital Park
Dubai Silicon Oasis
UAE



Sweden

Regeringsgatan 25
Stockholm
Sweden

Implementation & Customization Partner - AlpsGenAI



Email

info@alpsgenai.com



Call

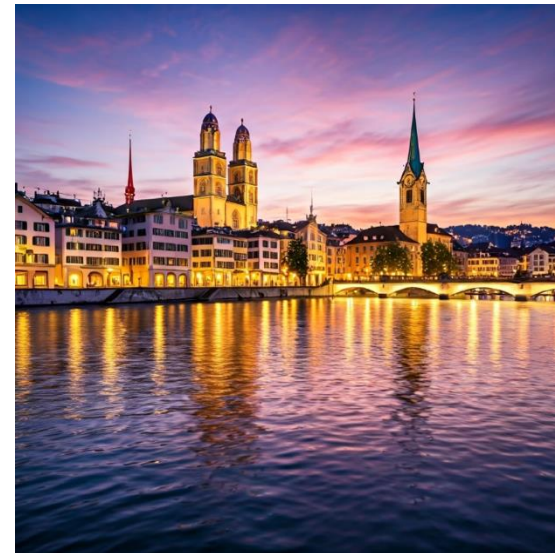
CH: +41768232214



Visit Online

<https://alpsgenai.com/>

Switzerland



AlpsGen AI

Hertistrasse 23
8304 Zurich
Switzerland