



AI Is Entering Wealth Management. Govern It.

The AI Operating System for Regulated Finance.

Confidence

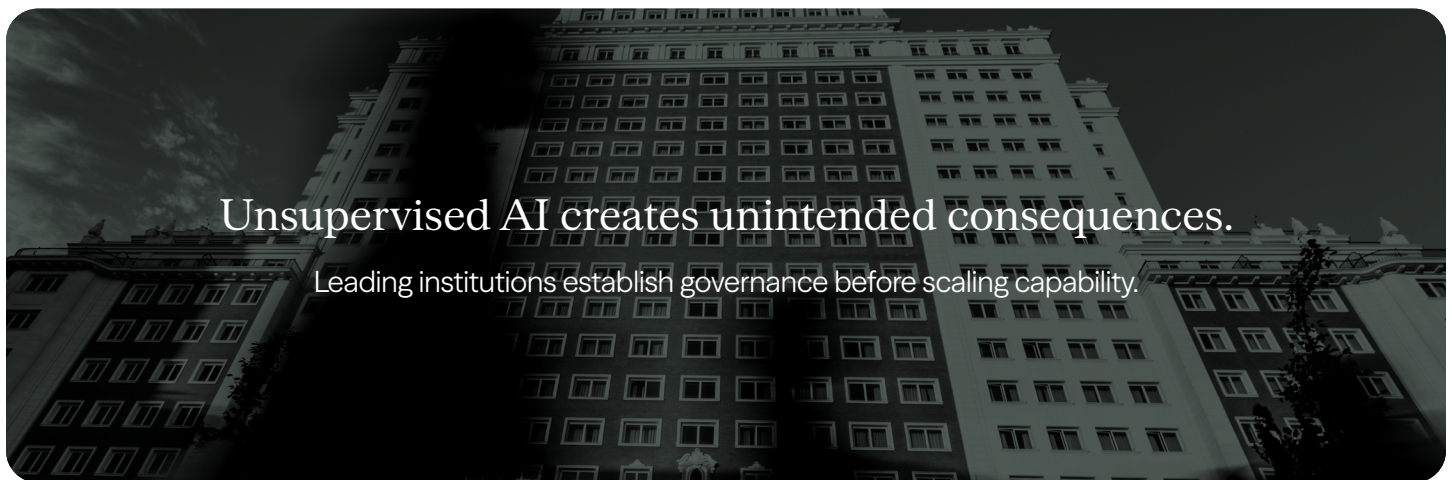
Operate advanced capability within documented supervision and compliance constraints

Cohesion

Unify CRM data, client communication, planning tools, and reporting workflows

Control

Keep proprietary client information contained and reviewable



Safety & Governance

- Communication traceability
- Compliance-aligned architecture
- Documented outputs
- No external data exposure

Future-proof by Design

- Advisor workflow AI agents
- Continuous capability expansion
- CRM and planning integration
- Firm-wide scalability

Competitive Edge

- Increase advisor capacity safely
- Enhance client experience
- Personalize engagement at scale
- Grow without adding strain

The Problem

Most AI tools operate beyond internal visibility. That creates supervision gaps, audit blind spots, and regulatory exposure. The real danger is unmanaged use. Unsupervised AI scales exposure as fast as it scales capability.

The Difference

Verapath is a deployable platform purpose-built for regulated finance. It installs governance architecture inside your environment. Intelligence becomes a governed operating discipline rather than an unmanaged disjointed toolset.

Intelligence in regulated finance must be governed to be trusted.

What system controls AI inside your RIA?