

CASE STUDY

AI Agent  
Powered by Worc

# Wealth Management Advisor Agent

An AI-orchestrated advisor agent that enables clients to query their portfolios in natural language, understand performance and risk, receive insights and recommendations.

- 24x7 intelligent client engagement
- Reduced advisor bandwidth on routine queries
- Higher client satisfaction & trust
- Improved advisor productivity per relationship
- Consistent, compliant client communication

*“The advisory agent helped us standardize investment recommendations, reduce turnaround time by over 60%, and improve advisor productivity - all while maintaining full compliance oversight. Enterprise-grade AI done right.”*

**Partner, Wealth Management Firm**

