

Driving Integrated Data Intelligence and Advisor Efficiency via Aether for a Major U.S. Financial Services Provider

Client Profile

One of the world's largest privately held financial services organizations, offering brokerage, retirement, wealth management, and institutional investment solutions.



ITHENA's Aether platform unified fragmented financial data into an AI intelligence layer, providing real-time analytics and predictive insights that boosted advisor productivity and decision-making enterprise-wide.

CHALLENGES



The client struggled with:

- Limited ability to unify data across brokerage, investing, and wealth management into one accessible intelligence layer
- Inefficient data access forces advisors to spend more time navigating systems than acting on insights
- Delayed reporting caused by fragmented data across disconnected categories across business units
- Absence of NLP-driven data access, requiring manual extraction and static dashboards for financial and customer decision-making
- Difficulty surfacing predictive and contextual insights across portfolios without excessive manual effort

SOLUTIONS



ITHENA's Aether platform empowered the client with:

1

Unified Data Lake Integration

Consolidated diverse data channels into a governed framework, giving stakeholders synchronized, real-time visibility

2

NLP-Driven Conversational Analytics

Enabled analysts and advisors to query enterprise data conversationally, replacing manual dashboard exploration

3

GenAI-Powered Insights

Automated report generation and ad hoc analysis, cutting data-to-insight time to seconds and freeing advisors to focus on clients

4

Predictive Intelligence

Detected trends and anomalies across retirement and wealth data, enabling proactive risk management

5

Agentic AI Recommendations

Delivered real-time recommendations directly into investment and operational workflows, accelerating decision-making

OPPORTUNITY FOR IMPACT

**40%**

Reduction in
manual
reporting

35%

Improvement in
report delivery
speed

32%

Faster
anomaly
identification

28%

Boost in
advisor
productivity