

HOLISTICO

Your complete investment toolkit, built by advisors, for advisors

Holistico is the AI-powered investment toolkit designed to simplify your workflow, enhance your proposals to clients and prospects, and ensure compliance. Created by advisors, it's purpose-built to address the challenges you face every day. Holistico empowers you with actionable insights, seamless tools, and time-saving automation — so you can focus on growing your practice.

Sign up



Modular architecture for tailored solutions

Holistico's modular design gives you the flexibility to choose the tools you need

Compliance Risk Manager

Navigate the complexities of regulatory compliance with ease

- Proactively monitors portfolio risks
- Flags potential issues before they arise
- Reduces the risk of fines in today's \$8.2B SEC penalty landscape¹

Fund & Company Screener

Quickly identify and evaluate investment opportunities

- Screens funds and companies using customized filters like ratings, sectors, and dividend yields

Portfolio Scanner

Quickly analyze and identify portfolio opportunities

- Provides an overview of current and proposed portfolio allocations
- Saves time with visual, data-driven insights

AI assistant Holi

Streamline your advisory workflow and enhance proposals to clients and prospects

- Generates actionable insights and client-ready talking points
- Suggests tailored investment opportunities
- Saves time by automating routine research and communication

Risk Calibrator

Align portfolios with client risk profiles effortlessly

- Offers three methods to assess and match risk preferences
- Recommends model portfolios tailored to each client's profile
- Compares portfolio risks with client expectations in a single view

Report Builder

Create professional reports

- Allows flexible order of report sections
- Generates client-ready PDF reports in minutes
- Saves templates for consistent, repeatable use

¹ Source: WSJ, SEC Collects Record \$8.2 Billion in Financial Penalties in 2024, 11/22/2024.

How Holistico empowers advisors

Save time and focus on your clients



Advisors spend just 17% of their time with clients, with up to 70% lost to administrative tasks². Holistico automates portfolio analysis, compliance checks, and reporting to help you reclaim time for client interactions.

Personalized insights at scale



Leverage AI tools to deliver tailored investment ideas and strategies, strengthening client trust while reducing time spent on manual research.

Stay ahead of compliance risks



With regulatory fines at an all-time high, compliance is critical. Holistico helps you monitor risks, address issues, and generate reports for consistent oversight across advisors, clients, and portfolios.

Scalable and ready for growth



Holistico's modular design ensures seamless integration into your practice, whether you're an independent advisor or part of a larger firm. Start with the tools you need and scale as you grow.

² Source: Kitces.com, How Financial Planners Actually Do Financial Planning, 2022.

We work with:

Intrinio

MORNINGSTAR

OpenAI

Google Cloud



invent

Goldman Sachs

Ready to transform your practice?

Go Holistico!

Scan to learn more & sign up



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