



WhealthChat for Inheritance and Estate Planning is a generative AI - powered chatbot that delivers expert-informed guidance, personalized recommendations, and access to innovative planning tools - all through a natural, conversational interface.

WhealthChat for Inheritance and Estate Planning

Empower your clients to make more confident, informed estate and inheritance planning decisions.

Surveys show that clients value estate and wealth transfer planning just as much as investment management - yet many financial professionals struggle to deliver this support at scale.

WhealthChat for Inheritance and Estate Planning changes that - giving financial professionals a simple, scalable way to meet a major unmet need.

Key Features and Benefits

- **AI-Powered Guidance:** Built on expert-authored content, the chatbot delivers personalized guidance that reflects best practices in financial, estate, and wealth transfer planning.
- **Behavioral Coaching:** WhealthChat's recommendations are informed by clinical practitioners in the fields of cognitive and behavioral psychology. These coaching elements are embedded within the chat to gently guide users toward better decisions and more consistent follow-through.

- **Interactive Needs and Goals**

Assessments: Identifies gaps in clients' current estate and inheritance planning efforts, recommends personalized next best actions, and assists in defining their inheritance goals and preferences.

- **Cognitive & Financial Capacity**

Assessments: Includes a clinically based diminished capacity assessment tool and a related financial literacy self-assessment to help ensure safe decision-making and informed wealth transfer planning.

- **Document Template Builders:**

Provides customizable templates for wills, power of attorney, living trusts, and other key legal documents.

WhealthChat's Estate and Inheritance Planning chatbot is designed for use by wealth management clients and are licensed and managed by wealth management firms. These client-facing tools can also be offered to employees for personal use to navigate well-being and caregiving challenges.

WhealthChat can be fully white-labeled and its AI model trained on company-specific research papers, marketing materials, and other compliance-approved content.

Pricing is customized based on firm size and implementation needs. White-labeling and customization options are included in enterprise plans.

Give clients the guidance they want - and the clarity they need

