



AI IN PRACTICE

Helping Wealth Management Leaders Move AI From Experimentation to Execution

Wealth teams are asking: Where should we focus? Which use cases are worth prioritizing? How do we drive adoption?

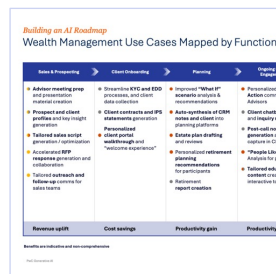
AI in Practice brings Vista's experience across software, data and technology companies to wealth managers seeking practical, tool-agnostic AI guidance

Three Ways To Engage

01 / Practical AI Education and Resources

Practical AI Education

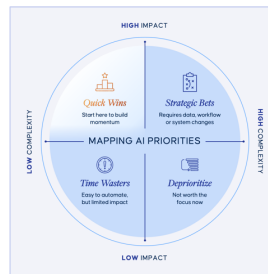
- Event or meeting presentation on top AI opportunities in wealth management
- How to move from pilots to scale
- How to build confidence and adoption across the team



02 / Customizable, Hands-On AI Workshops

Hands-On AI Workshops

- Generate AI opportunities tied to business needs
- Map use cases by value and complexity
- Leave with a prioritized roadmap your team can act on



03 / AI in Wealth Management Benchmarking

State of Wealth Management AI Adoption

Get a comprehensive view of how wealth management firms are adopting, governing and scaling AI.

- Compare your firm's AI maturity to peers
- Review proprietary wealth management insights
- Use study findings to guide priorities and investment

STATE OF WEALTH MANAGEMENT AI ADOPTION

Flagship Research Study / Cerulli Associates & Vista Equity Partners

65+
Unique Firms
\$1.2TN
Total Firm AUM
\$18BN
Average Firm AUM



*Read the
Full Report*



Partner With Vista

Engage one part of the program or combine all three into a tailored AI activation plan.

WE CAN:

- Share AI fundamentals and educational resources to elevate your firm's expertise
- Plan a tailored AI in Practice workshop to help your firm build and implement an AI roadmap
- Discuss insights on the current AI landscape within wealth management

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