THE PLATFORM VALUE GROUP

WEALTHTECH | WHITEPAPER

Closing the Platform Value Gap

Technology implementation has been rapid. Technology value realization has not.

A framework for unlocking trapped value inside the platform you already own.

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1. Executive Summary

Over the past two decades, wealth management firms have invested billions of dollars building increasingly sophisticated technology platforms. CRM systems, portfolio management, financial planning, client portals, workflow tools, data platforms, and now artificial intelligence have become central to the modern advisory business.

Yet despite this investment, many firms continue to struggle with the same operational challenges: advisors spending too much time on administrative work, inconsistent client experiences, fragmented workflows, duplicate data, uneven technology adoption, and difficulty measuring whether technology investments are producing the business outcomes they were intended to create.

The challenge is no longer acquiring technology. It is realizing value from the technology already in place.

This paper introduces the **Platform Value Gap**: the measurable difference between the capabilities a firm has purchased and the business value those capabilities actually produce.

Unlike traditional technology assessments that focus on implementations, vendor selection, or system functionality, the Platform Value Gap examines technology as an enterprise performance asset. It asks a different question:

How much value is still trapped inside the platform you already own?

$50B+	30%	37%
global wealth management IT spend, projected at $56.1B in 2024	of available platform features utilized by the average advisor	relative AUM growth-rate advantage for integrated platforms

For many mid-market wealth management firms, the answer is significant. Millions of dollars in annual productivity, growth capacity, and enterprise value remain unrealized—not because firms selected the wrong technology, but because implementation alone rarely changes how work gets done.

The challenge becomes even more consequential as firms accelerate their adoption of artificial intelligence. AI will reward organizations with connected data, integrated workflows, disciplined operating models, and measurable outcomes. Firms that have not built those foundations risk adding complexity faster than they create value.

This white paper presents a practical framework for understanding and addressing that challenge. It explains where the Platform Value Gap comes from, how it manifests inside wealth management firms, why it persists despite substantial technology investment, and what distinguishes organizations that consistently convert technology spending into measurable business performance.

More importantly, it introduces a new management discipline: **Platform Value Optimization.** Rather than viewing technology as an IT initiative or a series of implementation projects, Platform Value Optimization treats technology as a strategic asset whose value can be measured, managed, and continuously improved.

The firms that lead the next decade of wealth management are unlikely to be those that simply purchase the newest platforms or deploy the most AI tools. They will be the firms that build operating models capable of extracting more value from every technology investment they make.

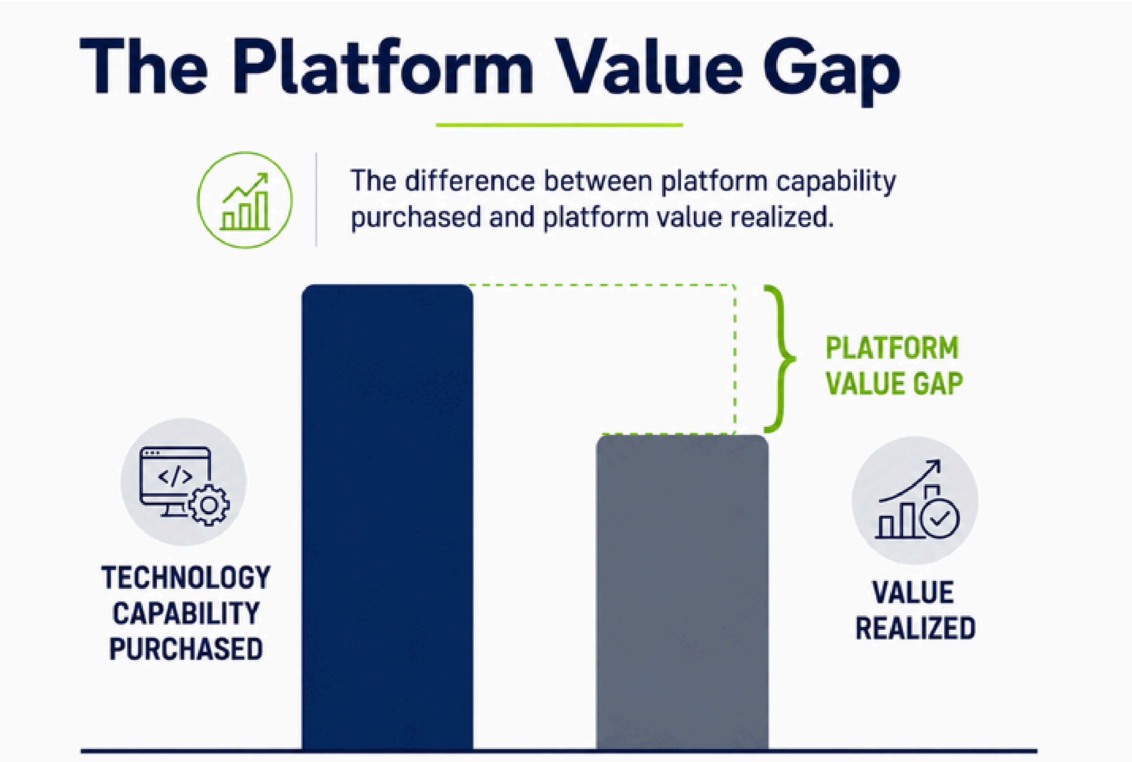
The opportunity is no longer to own better technology. It is to realize more value from the technology already in place.

02

The Platform Value Gap: Anatomy of a Structural Problem

What is the Platform Value Gap, and why does it matter now?

Wealth management firms have invested heavily in technology, but much of that investment has not yet translated into the productivity, growth, or client-experience gains leaders expected. Across the industry, advisory firms continue to operate with underused platforms, fragmented workflows, disconnected data, and manual workarounds that the technology was supposed to eliminate.
The result is a measurable gap between technology purchased and value realized. This is the Platform Value Gap.



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The gap is not simply a matter of advisors failing to use their tools. It is a structural problem created by the interaction of technology, workflow, data, behavior, and measurement. Most firms have continued to invest with the expectation that better tools will produce better outcomes. But technology does not create value on its own. Value is created when the platform changes how work gets done, how advisors engage clients, how leaders measure performance, and how quickly the firm can absorb new capabilities without adding complexity. The gap emerges when those conditions are not in place.

This is why the Platform Value Gap is both measurable and material. It shows up across three distinct dimensions: underutilized tech spend, lost advisor capacity and deferred AUM growth.

Underutilized technology spend. The global wealth management software market reached approximately $5.5 billion in 2024, with the United States representing roughly 37 percent of that figure, or approximately $2 billion in U.S. WealthTech software spend.[2] Industry research indicates that roughly half of advisory firms do not fully use the technology they have purchased, and the average advisor uses less than 30 percent of the features available on their primary platform.[1] On that basis, we can extrapolate that the underutilized portion of U.S. WealthTech software spend runs near $1 billion annually.

Lost advisor capacity. Advisors spend only 58 percent of their time on client-facing work; the remaining 42 percent is consumed by administration, investment-management activity, professional development, manual reconciliation, and workflow friction.[5] McKinsey estimates that technology-enabled levers can increase advisor capacity by 10 to 20 percent over the next decade, equivalent to adding 30,000 to 60,000 advisors at 2024 productivity levels.[6] Applied across roughly 330,000 U.S. financial advisors generating $500,000 to $600,000 in average annual revenue, that represents an estimated $16 billion to $40 billion in annual productivity opportunity.[7][8]

Deferred AUM growth. The 2025 Schwab RIA Benchmarking Study found that firms operating connected, automated platforms grew AUM 16.6 percent, compared with 12.1 percent for firms still relying on manual workflows — a 4.5-percentage-point absolute gap and a 37 percent relative growth-rate advantage.[4] Kitces Research corroborates the pattern from another angle: advisors with technology stacks that are at least 75 percent integrated manage 30 percent more AUM than peers operating with fragmented stacks.[9]

These figures should not be collapsed into a single industry total, because they measure different forms of value: software spend, revenue capacity, and assets under management. Together, however, they describe the same underlying condition. Wealth management firms are not just spending too much on technology they do not use. They are leaving productivity, growth, scale, and client experience on the table.

At the firm level, the same structural problem becomes concrete. The gap shows up in service teams that rekey data between systems, advisors who work outside the platform, operations teams that rely on spreadsheets, leadership teams that cannot see adoption or workflow performance clearly, and clients who experience the firm differently depending on which advisor or team serves them.

For mid-market wealth management firms, the economics are especially visible. In firms with 150 to 800 advisors, even modest underutilization can translate into millions of dollars in annual value at stake. At the smaller end of the segment, the gap can reach roughly $12 million per year; at the upper end, it can reach $100 million or more.[11] Across the mid-market wealth management segment, defined here as firms with 150 to 800 advisors, approximately $15 billion in annual value is at stake.[11]

The Platform Value Gap persists because firms often treat implementation as the finish line. A platform is selected, configured, launched, and declared complete. But the work that creates value begins after go-live. It requires redesigning workflows, integrating systems, enabling advisors by role and behavior, governing data, measuring outcomes, and managing the platform as a business-performance asset rather than an IT expense.

The problem is structural. Closing it requires a structural response.

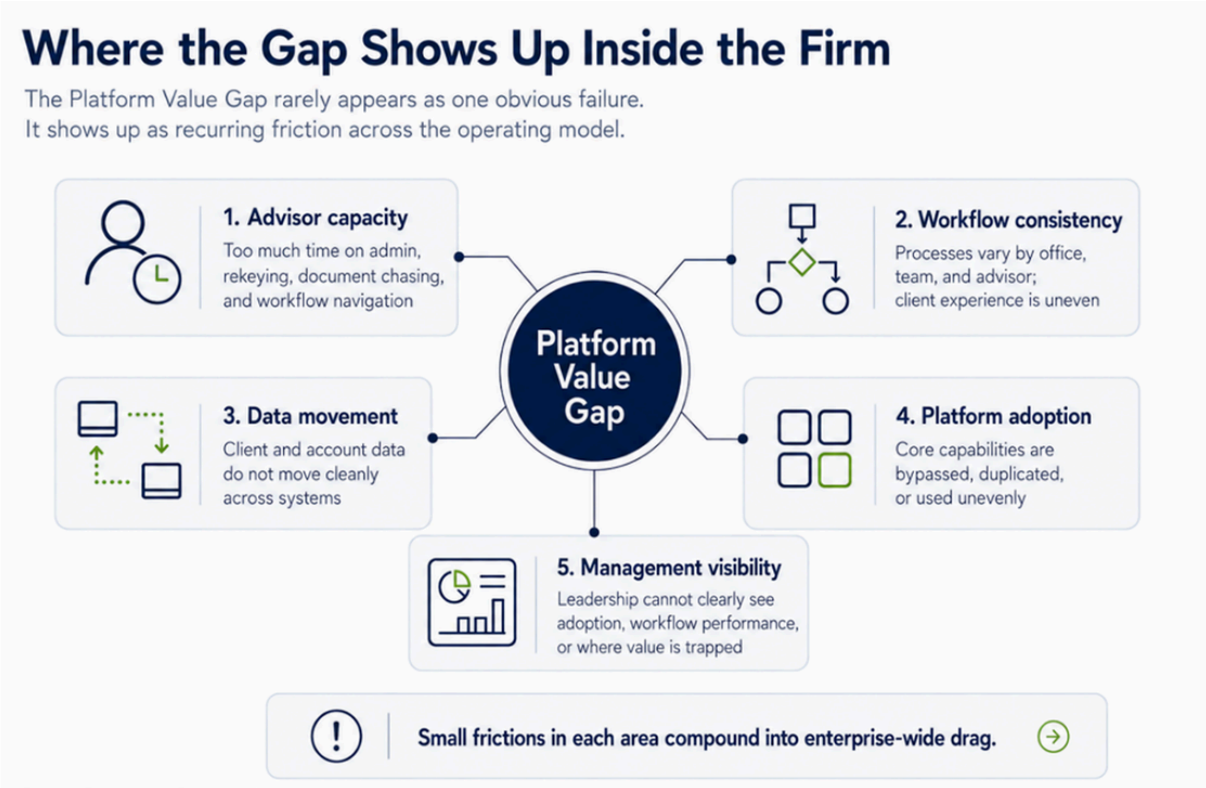
3. Where the Gap Shows Up Inside the Firm

How would leaders recognize the gap in their operating model?

The Platform Value Gap rarely appears as a single, obvious failure. More often, it shows up as a pattern of small frictions that seem manageable in isolation but become material at scale.

A client-service associate rekeys information between systems because data does not flow cleanly. An advisor builds a custom spreadsheet because the reporting tool does not answer the question in the moment. A regional manager cannot compare adoption across teams because platform-usage data is incomplete or inconsistent. A client receives a different experience depending on which advisor, office, or service team supports the relationship.

None of these issues looks strategic on its own. Together, they define the firm's operating ceiling.



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These signals are not random, and they are not, at root, a technology problem. For leadership, the question is not whether the firm owns enough technology. Most firms already do. It is whether the technology has changed the economics of the business. A firm does not close the gap by declaring an implementation complete. It closes the gap when platform usage changes daily behavior, improves workflow economics, increases advisor capacity, strengthens client experience, and gives leadership better visibility into how value is created.

The recurring frictions above trace back to a small set of structural conditions that reinforce one another over time. Four root causes account for much of the gap.

1. The Implementation–Transformation Fallacy. The most common misconception in WealthTech strategy is that implementation equals transformation. Boards approve budgets. Vendors deliver platforms. IT completes integrations. Training is scheduled. Go-live is announced. Leadership then waits for productivity gains, advisor adoption, and client-experience improvements to appear. But implementation is the beginning of transformation, not the end. The value-creation work happens after go-live, in the less visible but more consequential work of changing how the firm operates: redesigning workflows, clarifying roles, enabling teams by behavior and use case rather than feature training, and defining and measuring what success looks like. When firms treat implementation as the finish line, the platform may be technically live but economically under-realized.

2. Platform Fragmentation. Most firms did not set out to build fragmented operating environments. They made rational decisions over time, buying best-in-class tools for planning, CRM, portfolio management, reporting, billing, compliance, client portals, document management, and workflow. Each tool solved a real problem. But together they often created a system no one experiences as fully integrated. More technology does not necessarily create more capacity. This is what produces the data-movement and workflow-consistency frictions leaders see daily, as advisors toggle between systems, service teams reconcile data manually, and operations teams maintain spreadsheets alongside enterprise platforms. Fragmentation does not always look like failure; many fragmented firms are growing, profitable, and well run. The cost is what they cannot see; the productivity, consistency, and scale the platform should be producing but is not.

3. The Advisor Adoption Challenge. The third root cause is advisor adoption but not in the simplistic sense that advisors resist change. Adoption problems are usually misdiagnosed. Senior advisors protect established workflows because those workflows built successful practices. Newer advisors may be willing to use technology but lack the client base, confidence, or operating context to demonstrate its value. Mid-tier advisors, often the largest productivity opportunity, frequently receive the least targeted support. A single training program cannot solve those differences, and this is what surfaces as lost advisor capacity and uneven platform adoption. Effective adoption requires segmentation by role, tenure, business model, client base, and workflow reality. This is what shows advisors how the platform helps them serve clients, grow relationships, reduce administrative drag, and protect their time.

Advisors rarely change behavior because a tool exists; they change when the new behavior is easier, more valuable, better supported, and clearly connected to how the firm defines success. Treated as a communications or training problem, the gap persists. Treated as an operating-model and behavior-change problem, value begins to move.

4. The Measurement Gap. Most firms track technology costs with discipline. Far fewer track technology value with the same rigor. They know what they spend on software, vendors, implementation, support, and infrastructure, but may not know which capabilities are actually used, which workflows improved, which advisor segments adopted the platform, which manual processes were eliminated, or how platform usage correlates with productivity, retention, growth, and client experience. This is the root of the management-visibility problem. Without that measurement infrastructure, leaders manage by anecdote: advisors say a tool is not useful, operations says the workflow is better, IT says the platform is live, vendors report usage but no one can connect platform activity to business outcomes. This is why the Platform Value Gap can remain hidden inside otherwise successful firms. The cost is visible. The lost value is not.

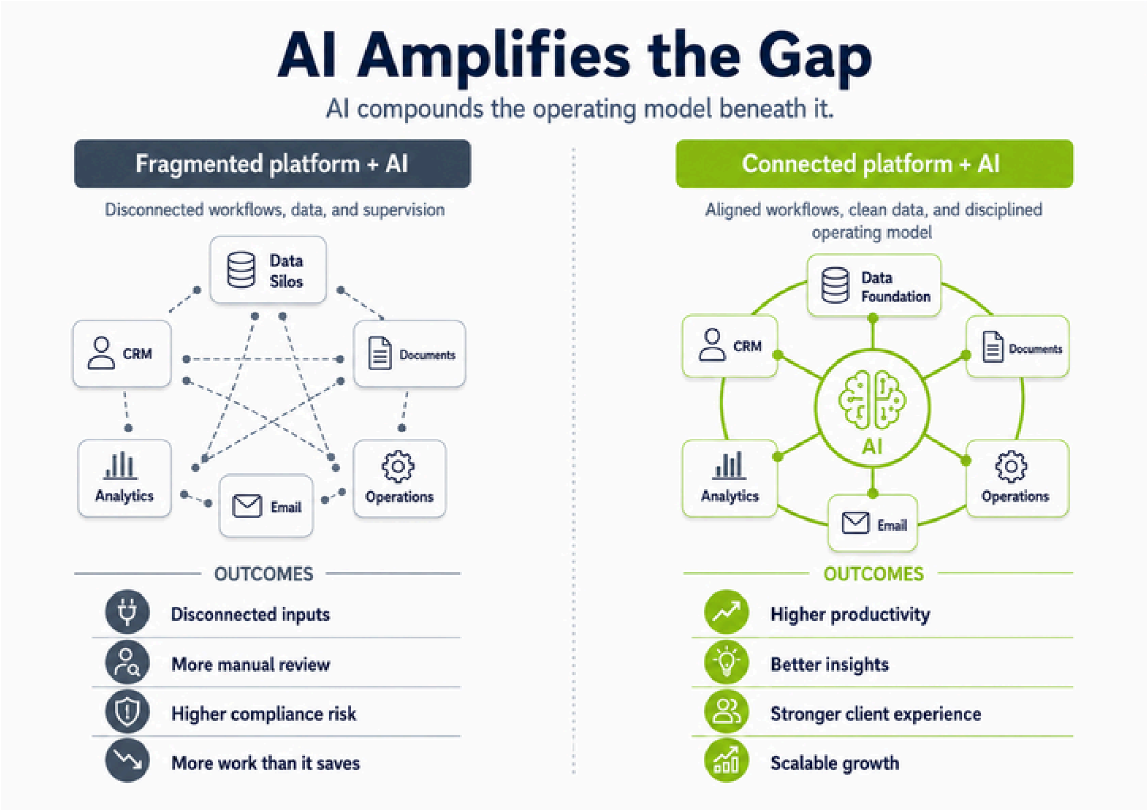
The firms that quantify these signals gain a management advantage. They can see which workflows create drag, which advisor segments need enablement, which integrations matter most, and where the next dollar of platform investment should go. Closing the gap requires measuring platform value as rigorously as platform spend and managing technology as a business-performance asset rather than a cost center.

4. AI Amplifies the Gap

Why will AI widen the difference between connected and fragmented firms?

Artificial intelligence does not automatically close the Platform Value Gap. In many firms, it will widen it. The promise of AI in wealth management is substantial: automation of operational work, faster preparation for client meetings, better identification of planning opportunities, more personalized client engagement, improved compliance review, and greater advisor capacity.[13][14] But those gains depend on the quality of the operating model underneath them.

AI requires connected data, clear workflows, defined supervision, and measurable outcomes. Without those foundations, AI does not remove complexity; it accelerates it. A fragmented platform gives AI fragmented inputs. Disconnected workflows produce disconnected outputs. Poorly governed data creates recommendations, summaries, alerts, and client-facing content that advisors must validate, correct, or avoid altogether.



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In that environment, AI can create more work than it saves.

The risks are not only operational. They are also regulatory and reputational. As AI becomes more embedded in advisor workflows, firms must be able to explain how AI-generated outputs are produced and supervised, and to demonstrate documented policies and procedures. Regulators have already pursued enforcement against misleading AI claims.[15] For wealth management firms, the message is clear: AI adoption without governance is not innovation. It is exposure.

For firms with fragmented platforms, AI becomes another layer of underutilized capability. It may generate meeting notes that do not connect to CRM workflows, planning prompts that do not align with approved advice processes, client insights that cannot be reconciled across systems, or automated communications that require manual review because the data foundation is unreliable.

For firms with connected platforms and disciplined operating models, the opposite is true. AI can compound platform value. It can surface planning opportunities earlier, reduce administrative drag, personalize client engagement, support compliance review, and help advisors scale service without diluting the relationship. In these firms, AI does not sit on top of the operating model as a disconnected tool. It becomes embedded in how work gets done.

This is why the Platform Value Gap matters now. The firms that have not closed the gap will struggle to capture AI's full economic benefit. The firms that have built connected workflows, clean data, strong enablement, and outcome measurement will be positioned to turn AI from a tool into a multiplier.

AI will not determine which firms win the next era of wealth management. Platform readiness will.

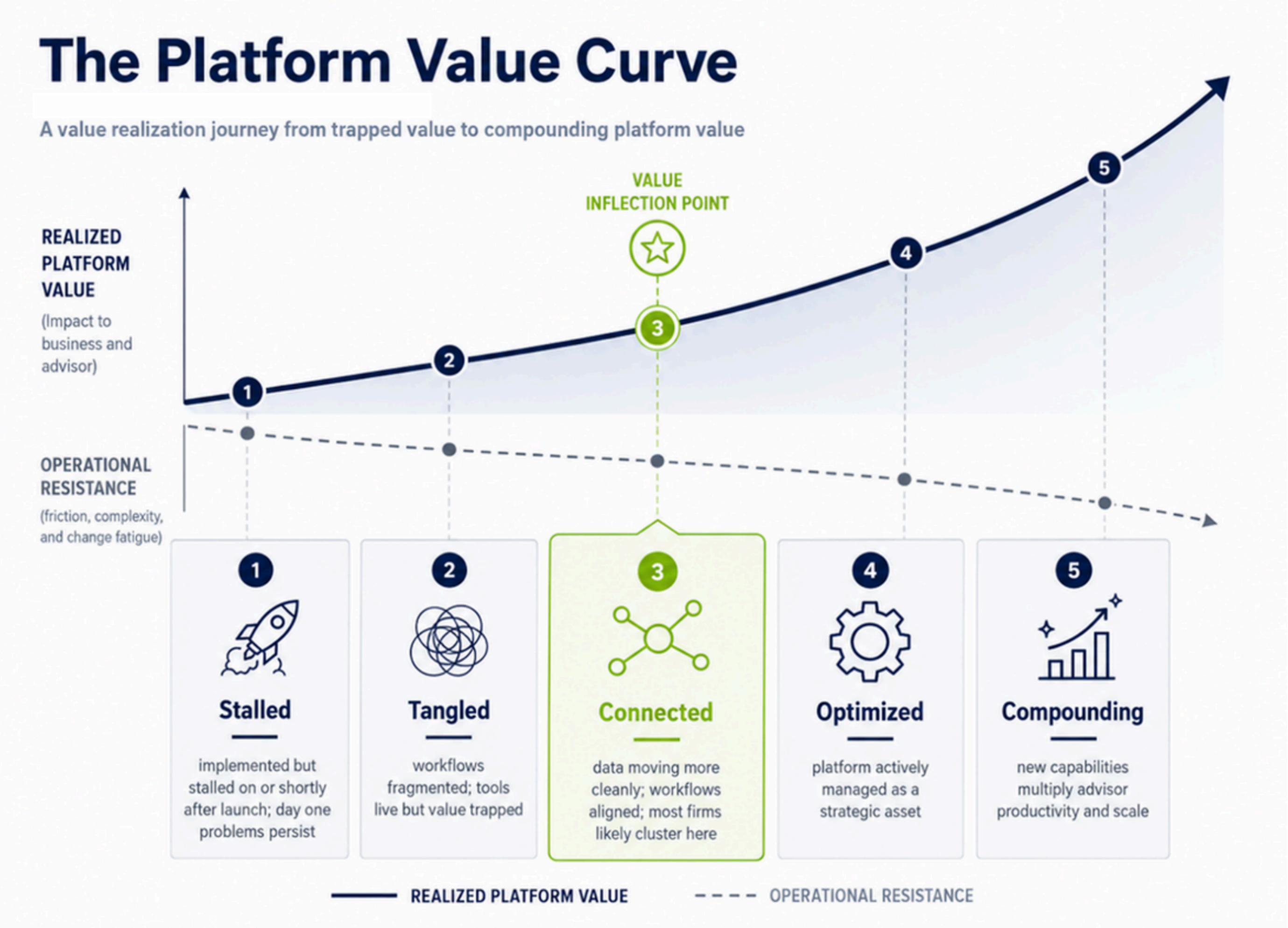
05

The Platform Value Curve

Where does the firm sit on the path from trapped value to compounding value?

The Platform Value Curve is a value-realization framework. It shows where firms typically fall on the path from technology purchase to realized business value, and why many firms remain stuck in the middle despite significant platform investment.

The curve is not a generic maturity model. It is a way to identify where value is being created, where it is being trapped, and what kind of organizational work is required to move the firm forward.



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While no public benchmark currently maps wealth management firms directly to the Platform Value Curve stages, existing industry research suggests that many firms remain concentrated in the early and middle stages: technology has been purchased and implemented, but workflows, data, advisor behavior, and measurement have not yet fully caught up.[1][4][9]

The five stages are:

Stage 1. Stalled. The investment is made, the platform is not fully operational. Data is not flowing, advisors work off prior systems, basic functionality is unused. The most expensive stage to stay in: cost accrues, value does not.

Stage 2. Tangled. Where most firms sit. The platform is operational but technology accumulates faster than the capacity to integrate it. The danger is that it is not obviously broken. Firms here are often growing and profitable; the cost is the productivity and client experience that should exist but do not.

Stage 3. Connected. The turning point. Investments compound, data flows, advisors work from a single client view. The hard work is organizational, not technical: getting teams with different tools and incentives to operate as a coherent system. Connected is the inflection point where realized value rises above operational resistance.

Stage 4. Optimized. The platform is managed as a strategic asset, measured and improved against competitive dynamics.

Stage 5. Compounding. Capability scales without proportional cost. AI compounds across the practice; new tools absorb into the operating model without rebuilding. Firms here are positioned to create the kind of productivity differential that defines the industry's leading edge, especially as AI becomes embedded in the operating model. (PVG analysis; see Appendix A, Assumption D2.)

06

Unlocking Platform Value

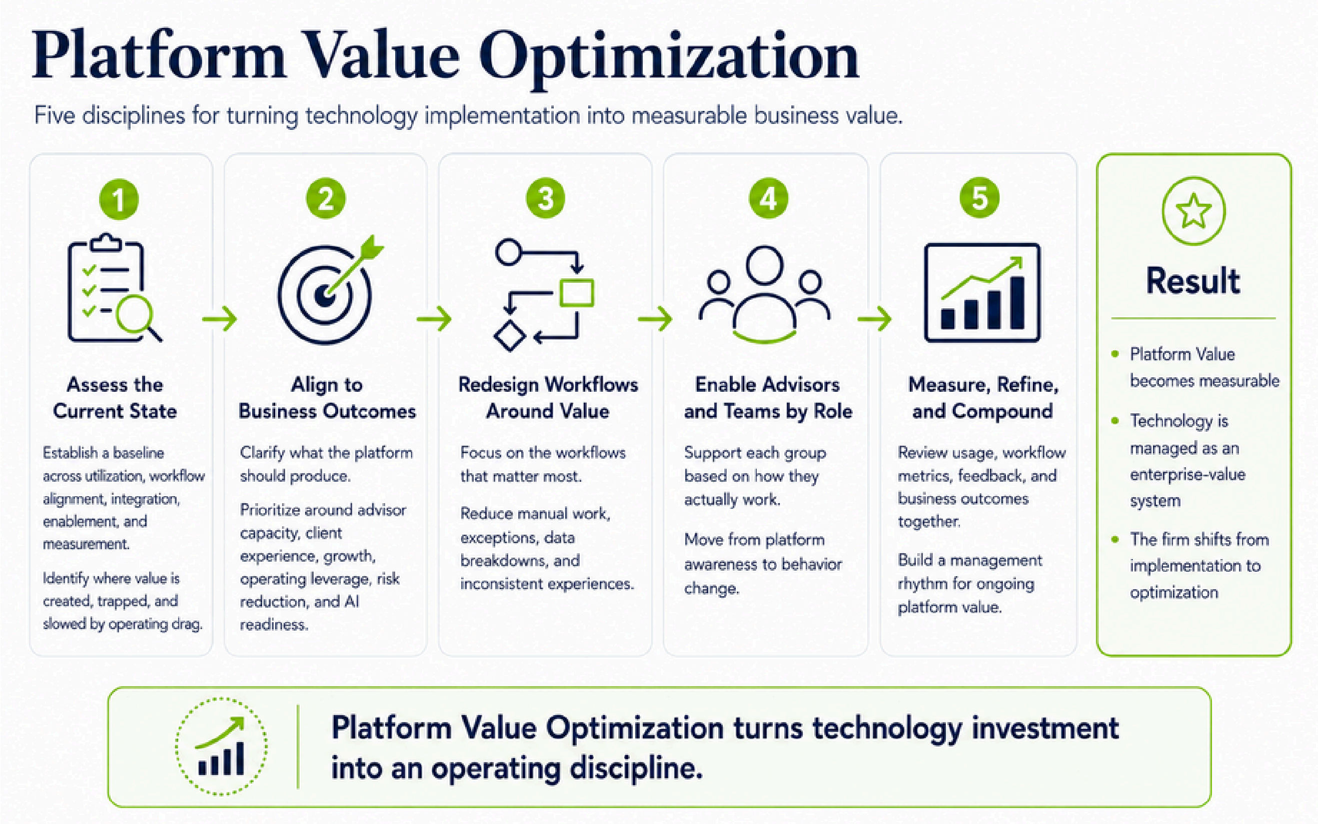
How does a firm move from technology implementation to value realization?

Closing the Platform Value Gap is not a technology-purchase exercise. It is an operating-discipline exercise.

A firm does not unlock Platform Value by adding another tool to the stack. In many cases, buying more technology before the operating model is ready only widens the gap. More tools create more workflows to manage, more data to reconcile, more advisor behavior to enable, and more outcomes to measure.

Platform Value is unlocked when the firm runs the right methodology on the technology it already owns.

Platform Value Optimization is that methodology. It is the structured practice of converting technology investment into measurable business value by aligning strategy, workflows, systems, advisor behavior, and outcome measurement.



The work can begin in two ways.

First, it can run alongside a new implementation. In that mode, Platform Value Optimization prevents the gap from opening. It ensures that the platform is not merely installed, but absorbed into the operating model from the start.

Second, it can run inside an existing platform environment where value has stalled. In that mode, Platform Value Optimization recovers value the firm has already paid for but has not yet fully captured.

The work is the same in both cases. The difference is timing: prevention before the gap opens, recovery after the gap has already formed.

Platform Value Optimization runs across five disciplines. Together, these disciplines turn technology implementation into an operating discipline for continuous value realization.

7. The Platform Value Assessment and Diagnostic

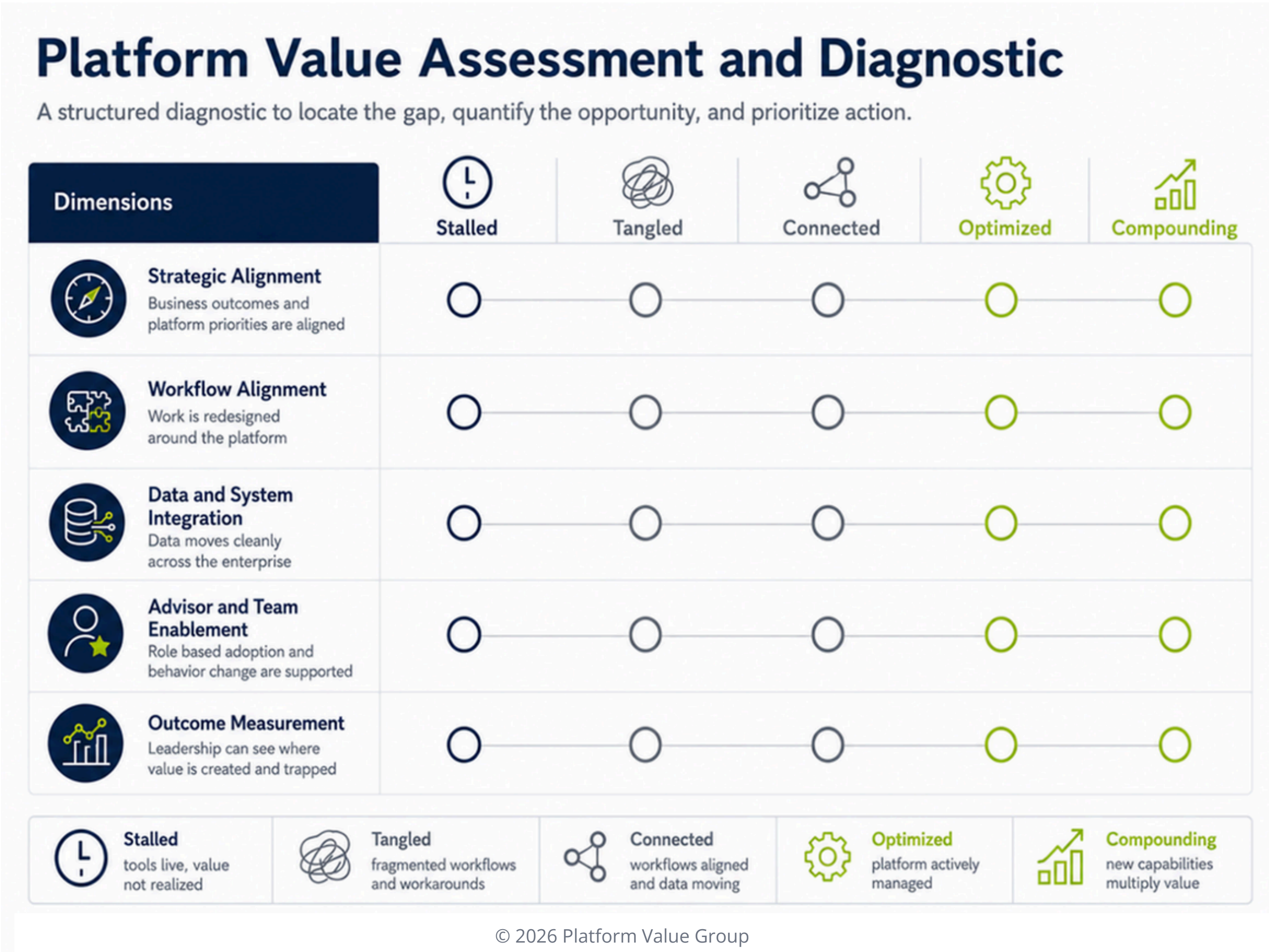
How can leaders quantify the gap and prioritize where to start?

The first step in closing the Platform Value Gap is knowing where the firm sits today.

Most leadership teams have a general sense that technology value is under-realized. They hear advisor feedback, see operational workarounds, review vendor costs, and recognize that platform usage is uneven. But without a structured diagnostic, the gap remains difficult to quantify, prioritize, or manage.

The Platform Value Assessment is designed to make the gap visible. It establishes a baseline across the key of Platform Value: strategic alignment, workflow alignment, system integration, advisor enablement, and outcome measurement. The assessment identifies where the firm is creating value, where value is trapped, and which interventions are most likely to produce measurable business impact.

The output is a Platform Value Score on a 0-to-100 scale. The score places the firm on the Platform Value Curve and gives leadership a practical view of where the firm stands: Stalled, Tangled, Connected, Optimized, or Compounding.



The diagnostic evaluates the five elements of platform value:

1. Strategy and value alignment
Does the firm have a clear view of what its platform is supposed to produce? This dimension evaluates whether technology priorities are tied to business outcomes such as advisor capacity, client experience, growth, retention, operating leverage, risk reduction, and AI readiness.

2. Workflow and operating-model alignment
Are workflows designed around the platform, or is the platform layered on top of legacy processes? This dimension identifies where manual work persists, where exceptions concentrate, where client experience varies, and where process friction limits scale.

3. Data and system integration
Does data move cleanly across the enterprise? This dimension evaluates how client, account, planning, portfolio, document, activity, and reporting data flow across systems, and where disconnected architecture creates friction, duplication, or risk.

4. Advisor and team enablement

Are advisors and support teams enabled to use the platform in the context of their actual work? This dimension evaluates adoption by role, tenure, workflow, business model, and behavioral readiness. It identifies where training is insufficient, where enablement is misaligned, and where advisor behavior is limiting value realization.

5. Measurement and management visibility

Can leadership see whether the platform is producing business value? This dimension evaluates whether the firm can measure adoption, workflow performance, advisor capacity, client experience, growth impact, and return on platform investment.

Together, these dimensions produce a practical diagnostic view of the firm's Platform Value Gap. The assessment does not simply identify what is broken. It prioritizes what matters most.

Leadership receives the outputs needed to turn Platform Value from a concept into a management discipline:

1. An executive readout of what matters most. A concise summary of findings, implications, strengths to preserve, and risks that could limit adoption, scalability, or enterprise value.
2. A Platform Value snapshot through an independent lens. A high-level view of the firm's Platform Value dimensions, including how the platform is performing today and where value may be constrained.
3. A practical path forward. Near-term quick wins and a suggested next step to help leadership act without waiting for a full redesign.

The assessment also serves as an AI-readiness indicator. Firms with weak workflow alignment, fragmented data, inconsistent adoption, and limited measurement will struggle to capture the full economic benefit of AI. Firms with stronger Platform Value scores are better positioned to use AI as a multiplier of advisor capacity, personalization, and scale. The purpose of the diagnostic is not to produce another technology report. It is to give leadership a management tool.

The firms that know where value is trapped can act with precision. They can prioritize the workflows that matter most, enable the advisor segments with the greatest productivity opportunity, address the integrations that create the most friction, and measure whether the platform is producing the outcomes it was intended to create.

That is how Platform Value Optimization begins.

8. Conclusion: The Next Era Begins Now

Why does the next era belong to firms that extract more value from the platforms they already own?

Wealth management has lived through multiple technology-driven revolutions. Each one shifted where value was created.

Online access changed the economics of information and execution. The advisory revolution moved value from product access to advice, planning, and relationship depth. The fintech era gave firms access to more tools, more data, and more digital capability than ever before.

The next shift is already underway. Artificial intelligence, automation, and data-driven advice will move value again. This time, the advantage will not belong to the firms that simply own the most technology. It will belong to the firms that can translate technology into measurable productivity, scalable growth, better client experiences, and stronger enterprise value.
That is the work of closing the Platform Value Gap.

The gap is not unique to any single firm. It is an industry-wide condition experienced firm by firm. It appears in underused platforms, fragmented workflows, disconnected data, inconsistent adoption, limited measurement, and growth that fails to compound at the rate it should.

The firms that close the gap will be better positioned to absorb AI, scale advisor capacity, personalize client engagement, improve operating leverage, and compete in a market where digital and advice experiences increasingly define client expectations. Firms that do not close it will continue to carry hidden drag inside the operating model, even as they invest in more technology.

The next era of wealth management will not be won by technology ownership alone. It will be won by Platform Value: the discipline of turning technology platforms into engines of productivity, advice, and enterprise growth. The firms that build that discipline first will set the operating standard for the rest of the market.

Endnotes and Source Register

The Platform Value Gap is a management framework developed by Platform Value Group to help wealth management leaders evaluate the difference between technology investment and realized business value. While the industry has extensively studied technology adoption, integration, advisor productivity, and technology spending, no widely accepted framework currently exists for measuring Platform Value or quantifying the Platform Value Gap.

Accordingly, unless otherwise noted, quantitative estimates presented throughout this paper represent Platform Value Group analysis derived from publicly available industry research. These estimates are intended to illustrate the approximate magnitude of the opportunity rather than precise market measurements. Industry statistics are cited directly throughout the paper, while derived estimates are based on transparent assumptions and should be interpreted as directional analyses rather than audited financial calculations.

The Platform Value Curve is a proprietary analytical framework developed by Platform Value Group. It is intended as a management model for evaluating platform maturity and value realization and is not designed to map directly to any third-party maturity model.

Readers are encouraged to apply their own organizational assumptions when evaluating firm-specific Platform Value and estimating the opportunity within their own operating environment.

The remainder of this section consolidates the numbered references used and ties each citation to its source, calculation basis, or PVG analytical assumption.

Ref.	What it supports	Source and use in the paper
[1]	Technology utilization and feature adoption	Industry research indicates that only about half of advisory firms fully use the technology they have purchased, and the average advisor uses less than 30 percent of available features on the primary platform. Source basis: InvestmentNews Research, 2022 Adviser Technology Study; Docupace utilization studies; Kitces Research category-level utilization data. Used for the utilization gap and the <30 percent feature-use claim.
[2]	WealthTech software market size	Grand View Research estimated the global wealth management software market at approximately $5.5 billion in 2024, with North America representing roughly 37% of global market revenue. Applying the North America share as a U.S./North America proxy implies approximately $2.0 billion in relevant WealthTech software spend.
[3]	Technology spend as a share of firm revenue	Technology spending averages approximately 3.8 to 4 percent of advisory firm revenue, with top firms often investing more. Source basis: InvestmentNews 2024 Advisor Benchmark Study. Not central to the current 6/11 body text, but retained as supporting context for firm-level technology spend assumptions.
[4]	Integrated platform growth differential	The 2025 Schwab RIA Benchmarking Study reports that firms operating connected, automated platforms grew AUM 16.6 percent versus 12.1 percent for firms relying on manual workflows. This is a 4.5-percentage-point absolute gap and a 37 percent relative growth-rate advantage.

Ref.	What it supports	Source and use in the paper
[5]	Advisor time allocation	Advisors spend approximately 58 percent of time on client-facing work and 42 percent on administration, investment-management activity, professional development, manual reconciliation, and operational friction. Source basis: KPMG, citing Cerulli Associates time-allocation data.
[6]	Recoverable advisor capacity	Technology-enabled levers can increase advisor capacity by 10 to 20 percent over time, equivalent to adding 30,000 to 60,000 advisors at 2024 productivity levels. Source basis: McKinsey wealth management research.
[7]	Advisor count and revenue base	Approximate U.S. advisor population and revenue base used for the capacity calculation: roughly 330,000 practicing U.S. financial advisors and $500,000 to $600,000 average annual revenue per advisor, implying a $165 billion to $200 billion advisor-revenue base. Source basis: Investment Adviser Association, BLS/SIFMA advisor population estimates, InvestmentNews 2025 Advisor Benchmarking Study, and Kitces Research productivity data.
[8]	RIA industry scale context	Registered investment adviser industry scale and firm/client context from Investment Adviser Association industry snapshot materials. Used as background for the broader advisor and firm universe.
[9]	Integration premium	Kitces Research reports that advisors with technology stacks that are at least 75 percent integrated manage approximately 30 percent more AUM than peers with fragmented stacks. Used as independent support for the integration/growth relationship.
[10]	Deferred AUM growth estimate	PVG analysis applying the Schwab 4.5-percentage-point growth differential to approximately $43 trillion in advisor-managed assets not operating in optimized environments. $43T x 4.5 percentage points = approximately $1.9T, rounded to “approaching $2T” in potential annual AUM growth before compounding.
[11]	Firm-level and segment-level Platform Value Gap estimate	PVG analysis of the mid-market segment, defined as non-wirehouse firms with approximately 150 to 800 advisors. Firm-level value at stake is estimated from underutilized technology spend, recoverable advisor capacity, and deferred AUM growth/revenue opportunity. Segment-level estimate uses roughly 300 firms and a midpoint gap of approximately $50 million per firm, yielding approximately $15 billion annually.

About the Author

Jennifer Maruca is Founder and Principal of Platform Value Group, where she advises wealth management firms on technology strategy, operating model transformation, AI readiness, and platform value optimization.

Over more than three decades in wealth management, Jennifer has held leadership roles spanning advisor consulting, technology transformation, operations, change management, and executive strategy. She has helped broker-dealers, RIAs, and WealthTech firms implement enterprise platforms, improve advisor adoption, modernize operating models, and translate technology investments into measurable business outcomes.

Closing the Platform Value Gap introduces Platform Value as a management discipline for measuring and improving the enterprise value created by technology platforms.

About Platform Value Group

Platform Value Group helps wealth management firms maximize the business value of their technology platforms.

Rather than focusing solely on implementation, Platform Value Group works with executive teams to improve technology ROI, advisor productivity, workflow integration, AI readiness, and enterprise performance through Platform Value Optimization.

Services include:

- Platform Value Assessments
- Executive Strategy & Transformation
- AI Readiness & Operating Model Design
- Fractional COO / CTO Advisory
- Executive Workshops & Keynotes

Continue the Conversation

Interested in understanding where Platform Value may be trapped inside your organization?
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