

What Alexa Really Means for Wealth Management

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Advisors in the past year have likely caught fintech demos at wealth management conferences demonstrating how they and their clients can introduce voice assistants like Amazon's Alexa into the planning process.

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Big firms have followed suit. Envestnet|Yodlee and eMoney Advisor are now promoting new voice recognition technology as “Alexa-empowered” that can help advisors retrieve information about client accounts or assist them with navigating CRM portals. TD Ameritrade recently announced an overhauled Amazon Alexa Skill, where retail clients can access accounts and place trades by speaking to an enabled device.

Read Full Article, Written by Sean Allocca of Financial Planning, [here](#)