



## FactSet Expands Wealth Management Workflow AI Capabilities Through Partnership with TIFIN.AI

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*The partnership brings FactSet's trusted financial intelligence directly into agentic advisor workflows, helping advisors deliver personalized service at scale*

NORWALK, Conn., June 29, 2026 (GLOBE NEWSWIRE) -- [FactSet](#), a leading global data and AI solutions provider to the financial markets, today announced a partnership with [TIFIN.AI](#), a leading AI platform for the wealth, asset management, and insurance industries, to accelerate the delivery of next-generation AI-powered workflows for wealth management firms. To further cement this long-term collaboration, FactSet has also made a strategic investment in TIFIN.AI, reflecting both companies' commitment to accelerating the adoption of AI-powered workflows and advancing innovation across the wealth management sector.

Through the partnership with TIFIN.AI, FactSet will offer solutions to increase advisor productivity, deepen client engagement, and deliver personalized client service. FactSet's clients will gain access to a growing suite of AI-powered capabilities integrated within FactSet Workstation and the broader wealth management ecosystem, with opportunities to expand across additional wealth management workflows over time. Initial solutions include:

- **Meeting Prep Agent:** generates client-ready summaries, action items, portfolio insights, and personalized talking points in minutes, so advisors can focus less on prep and more on building meaningful client relationships.
- **Book Intelligence Agent:** surfaces actionable insights across an advisor's book of business to help identify portfolio opportunities, strengthen client engagement, and prioritize outreach.

The new suite features:

- **Institutional-Grade Intelligence:** a combination of FactSet's institutional-grade market data, analytics, and wealth management capabilities paired with TIFIN.AI's purpose-built agentic workflow technology.
- **Seamless Workflow Integration:** the solution is designed to embed directly into advisor workflows, enabling firms to enhance productivity without disrupting existing operating models.
- **Secure Enterprise-Ready Architecture:** TIFIN.AI's engine will operate entirely within FactSet's infrastructure, ensuring client portfolio data remains inside FactSet's environment.
- **Auditable AI:** the solution leverages FactSet's domain-specific answers engine and auditable workflows, providing firms with traceability into generated insights and helping mitigate hallucination risks associated with generic large language models.

"This partnership reflects FactSet's continued commitment to helping wealth management firms modernize advisor workflows through practical, enterprise-grade AI solutions," said Kristina Karnovsky, Executive Vice President, Co-Head of Product at FactSet. "By combining FactSet's trusted data infrastructure and analytics capabilities with TIFIN's agentic workflow technology, we are enabling firms to deliver more personalized client experiences at scale while maintaining the transparency, governance, and operational rigor the industry requires. We are excited to continue building agents that drive innovation and efficiency for our wealth clients across critical workflows."

"FactSet's strategic partnership reflects a shared belief that agentic workforces will play an important role in the future of wealth management," said Harshendu Bindal, CEO of TIFIN.AI. "By combining FactSet's trusted intelligence with our agentic capabilities, we are advancing a new generation of advisor workflows."

Full details on FactSet's AI solutions for wealth are available here: [www.factset.com/marketplace/catalog/product/factset-ai-for-wealth](https://www.factset.com/marketplace/catalog/product/factset-ai-for-wealth).

### About FactSet

FactSet (NYSE:FDS | NASDAQ:FDS) supercharges financial intelligence, offering enterprise data and information solutions that power our clients to maximize their potential. Our cutting-edge digital platform seamlessly integrates proprietary financial data, client datasets, third-party sources, and flexible technology to deliver tailored solutions across the buy-side, sell-side, wealth management, private equity, and corporate sectors. With over 47 years of expertise, offices in 19 countries, and extensive multi-asset class coverage, we leverage advanced data connectivity alongside AI and next-generation tools to streamline workflows, drive productivity, and enable smarter, faster decision-making. Serving more than 9,000 global clients and over 241,000 individual users, FactSet is a member of the S&P 500 dedicated to innovation and long-term client success. Learn more at [www.factset.com](https://www.factset.com) and follow us on [X](#) and [LinkedIn](#).

**About TIFIN.AI**

TIFIN.AI is an AI platform for wealth, asset management, and insurance. The company builds agentic workforces to augment functions across wealth. Its systems connect data, software and workflows, with the goal of delivering better wealth outcomes for more people.

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The logo for FactSet, featuring the word "FACTSET" in a bold, blue, sans-serif font. The letters are spaced out, with "FACT" on the left and "SET" on the right.