Jeff Mount on helping the “middle-class millionaire” feel more confident

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“We are certainly seeing the rise of artificial intelligence in trading, financial planning and of course we have robo-advisors who have very quickly risen to compete in terms of assets under management with even the insurance companies and bank brokerages. I don’t know if they will ever take over the big wirehouses but they certainly have done a very impressive job in terms of growth in assets under management with those smaller accounts.” States Jeff Mount, President of Real Intelligence LLC, in an interview with InvestorIntel’s Tracy Weslosky.

Jeff went on to say that Real Intelligence’s objective is to help the “middle-class millionaires” feel more confident about matching up their assets vs their liabilities, have a clear understanding of what they can and cannot do and know that there is a human-centric financial planner who is behind this to make sure that the strategic thought that comes out of the plan can be applied very quickly and easily. Real Intelligence is working towards empowering wealth consultants to overcome the competitive challenges of artificial intelligence.

To access the complete interview, click here