

Company: Wells Fargo & Company, Minneapolis, MN

Company Description: Wells Fargo & Company is an American multinational financial services company with a significant global presence. The company operates in 35 countries and serves over 70 million customers worldwide.

Nomination Category: Technology Categories

Nomination Sub Category: Best Technical Support Solution - Computer Technologies

Nomination Title: Advisory Gateway – The Ultimate Digital Platform for Financial Advisors

1. Which will you submit for this nomination, a video of up to five (5) minutes in length or a written essay of up to 650 words? Choose one:

Essay of up to 650 words

2. If you are submitting a video of up to five (5) minutes in length, provide the URL of the nominated video here, OR attach it to your entry via the "Add Attachments, Videos, or Links to This Entry" link above, through which you may also upload a copy of your video:
3. If you are providing a written essay for this nomination, submit in this space an essay of up to 650 words describing the nominated Technical Support Solution since 1 January 2023:

Total 524 words used.

Financial Advisors today operate in a fragmented digital ecosystem, often relying on multiple heritage tools and disjointed data sources to serve clients. This results in Advisor time loss, increased operational risk, and inconsistent client experiences. Advisors are also expected to remain compliant with regulatory changes, deliver personalized advice at scale, manage complex portfolios, and differentiate themselves in an increasingly digital-first market.

To address these challenges, Wells Fargo developed Advisor Gateway, a transformational advisor platform that reimagines how financial professionals interact with data, systems, and clients. Introduced in 2023, Advisor Gateway replaces outdated systems such as ClientLink, WealthX and Smart Station and consolidates over 150 systems into a single, secure, AI-powered interface. The platform was developed in alignment with Wells Fargo's enterprise guidelines for the responsible development and deployment of AI technologies.

Advisor Gateway provides an end-to-end digital experience that is intuitive, intelligent, and tailored to how advisors actually work. From prospecting to planning, execution, and servicing, advisors now operate in one streamlined platform.

Key features include:

- Pre-built contextual workspaces that provide full visibility into the client journey - from portfolio performance and goals to risk preferences and service history
- Cross-platform data search and aggregation from both internal systems and third-party sources
- Natural Language Processing and GenAI, offering predictive insights, generating tailored reports, and automating client communications
- Voice-activated workflows that allow hands-free interaction using conversational language
- Responsive design across desktop and mobile for real-time access from anywhere

What truly sets Advisor Gateway apart is its dual focus on innovation and usability. The platform is built on a modular, open-standard architecture leveraging FDC3, a protocol maintained by FINOS that supports interoperability and seamless integration with current tools and future AI partners. This ensures both future scalability and reduced development complexity.

Its single-pane interface supports customizable workspaces and allows advisors to create and save interaction views for efficient access and re-use. With its "AI-of-AI" orchestration framework, Advisor Gateway is uniquely positioned to integrate internal and third-party bots, enabling an intelligent ecosystem that evolves over time.

The user experience is designed with simplicity in mind, mimicking the navigation style of a mobile app store. This "iPhone-like" interface organizes tools by function (e.g., planning, money movement, prospecting), making task discovery intuitive and user-friendly. In addition, the platform's zero-footprint design supports code reusability across channels, accelerating delivery and lowering operational costs.

The results from Advisor Gateway's initial deployment are compelling:

- 30%- 40% improvement in advisor productivity, as time spent switching between systems is significantly reduced

- Faster onboarding and training, thanks to an intuitive user interface and simplified workflows

- Improved client satisfaction, driven by personalization, faster response times and seamless engagement

- Significant cost reduction and risk mitigation, through the decommissioning of legacy systems and consolidation of compliance frameworks

Advisory Gateway represents a bold leap forward in reimagining the advisor experience. It is not just a technology platform—it is a strategic foundation that empowers advisors to work smarter, engage more meaningfully with clients, and drive growth in a digital-first world. With its AI-first design, intuitive interface, and flexible architecture, Advisor Gateway is transforming financial services from the inside out and is redefining what's possible for advisory teams in the modern era.

4. In bullet-list form (up to 150 words), provide a brief summary of up to ten (10) of the chief achievements of the nominated Technical Support Solution since 1 January 2023:

Total 105 words used.

Below is a listing of top achievements for Advisor Gateway:

- Consolidated over 150 legacy systems into one unified advisor platform
- Boosted advisor productivity by 30–40% through workflow simplification
- Introduced AI and GenAI to generate predictive insights and personalized reports
- Enabled voice-activated workflows for hands-free task execution
- Delivered pre-built, contextual workspaces to manage entire client journeys
- Deployed cross-platform smart search across 80M+ internal and third-party data points
- Built on FDC3 open standards for seamless integration and long-term flexibility
- Developed a scalable "AI-of-AI" orchestration engine to plug in future bots
- Designed an app-store-style interface with personalized, savable workspaces
- Provided a mobile-first, zero-footprint experience across devices and channels

Attachments/Links:

[Advisory Gateway – The Ultimate Digital Platform for Financial Advisors](#)

No attachment available for this nomination.

