

Couplr AI Surpasses 1,000 Financial Advisor Profiles, Redefining Client-Advisor Matching

Couplr AI Celebrates Major Milestone: Over 1,000 Advisors Now on Platform while integrating with two large CRMs

FL, UNITED STATES, March 17, 2025 /EINPresswire.com/ -- [Couplr AI](#), the premier find-an-advisor platform for insurance and wealth management companies, is thrilled to announce a major milestone: over 1,000 financial advisors are now featured on its cutting-edge platform. This

achievement underscores Couplr AI's commitment to revolutionizing how clients connect with financial professionals.

Traditional client acquisition in the financial services industry is expensive, inefficient, and often misaligned with client needs. Couplr AI flips the script by leveraging data science to streamline the advisor-client matching process, reducing acquisition costs while significantly improving conversion rates. Unlike conventional lead-generation methods, Couplr AI prioritizes deeper connections, matching clients and advisors based on personality, preferences, and shared values—ensuring a more personalized and effective financial planning experience.

“Our journey to this milestone reflects the trust our partners and financial advisors place in our technology,” said Derek Notman, Founder & CEO of Couplr AI. “Our mission is simple: remove the friction from the advisor-client matching process, making financial advice more accessible, personalized, and impactful.”

In addition to growing its advisor network, Couplr AI has also integrated with industry-leading customer relationship management (CRM) systems, Redtail CRM and Wealthbox CRM. These integrations empower advisors to manage inbound leads effortlessly, allowing them to focus on delivering high-touch, personalized service to their clients.

As Couplr AI continues its rapid growth, the company remains committed to innovation, continuously enhancing its platform to better serve clients, advisors, and the broader insurance



and wealth management industry. By challenging the status quo, Couplr AI is setting a new standard for how financial professionals and clients connect in today's digital landscape.

For more information about Couplr AI, visit <https://www.couplr.ai/>.

****Media Contact:****

Derek Notman
Founder & CEO
hello@couplr.ai
Couplr AI
<https://www.couplr.ai/>

Derek Notman
Couplr, Inc.
[email us here](#)
Visit us on social media:
[LinkedIn](#)

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