



Profile Software expands Axia Suite with Next-Generation Wealth Management capabilities for Retail and Mass Affluent clients

Athens, 13 November 2025: [Profile](#), a leading global provider of financial software solutions, announces a major new release of its flagship [Axia Suite](#), introducing advanced **Wealth Management** features designed to better serve **Retail** and **Mass Affluent** investors.

Building on Axia's proven expertise in **Private** and **Institutional Wealth Management**, the enhanced solution now extends its reach with **AI.Adaptive**, Profile's agentic AI solution, delivering **personalised investing**, **intuitive digital experiences**, and **dynamic advisory tools**. These innovations enable financial institutions to offer scalable, high-touch investment services across all client segments, combining automation with human insight for maximum personalisation and engagement.

The upgraded solution brings **new investment selection** and **portfolio construction** processes, supported by artificial intelligence, for both **Relationship Managers (RMs)** in large banking organisations and **High-Net-Worth Individuals (HNWI)**. Designed to elevate service across both physical and digital channels, Axia strengthens collaboration between advisors and clients, enabling the delivery of tailored, compliant proposals within a seamless and interactive environment.

Through **dynamic investment workflows**, clients receive personalised insights, educational support, and recommendations that align with their goals, risk profile, and thematic preferences - making investing both transparent and empowering.

This latest release brings a fresh, forward-looking approach to **digital Wealth Management**, transforming the investment experience into a journey of strategic empowerment. With smart tools that enhance interactivity, speed, and personalisation, RMs gain a digital partner that helps them stand out, while clients benefit from a **fast** and **effective** investment experience.

More than a technical upgrade, the solution incorporates **strategic capabilities** that empower large banking organisations to expand their investment services with agility and precision. Axia supports faster decision-making, adaptability to shifting market conditions, and **deeper engagement** between RMs and clients - setting a new standard for modern Wealth Management.

With this evolution, **Axia Suite** further strengthens its position as a **comprehensive, single platform** for all investment operations - offering advanced **Wealth Management** capabilities across **Retail**, **Mass Affluent**, **Private**, and **Institutional** segments, along with **sophisticated solutions for Custody, Asset and Fund Management**. This unified approach ensures complete operational efficiency, regulatory alignment, and a seamless client and investment servicing experience.