

UBS FINANCIAL SERVICES INC.



INITIATIVE	STAAT (Smart Technologies & Advanced Analytics Team) Insights
AWARD	Celent Model Wealth Manager 2026 for Data, Analytics, and AI
EXECUTIVE SUMMARY	STAAT Insights is a flagship data-driven, AI solution designed to empower 5,000+ UBS financial advisors with highly relevant, timely, and personalized client intelligence. The UBS STAAT engine aggregates thousands of signals from internal and external data sources to alert advisors to their clients' life events, such as property listings or late-stage business funding, and delivers briefings directly to advisors' inboxes ahead of their client meetings. Advisors can also access STAAT Insights on-demand to easily find information through the self-service application in their workstation. The platform saves FAs hours of meeting preparation time and enables deeper, more proactive client conversations.
KEY BENEFITS	STAAT Insights enhances client outcomes by enabling advisors to engage more proactively and with greater contextual awareness. Advisors can identify relevant opportunities earlier, often before clients explicitly raise them, improving responsiveness and quality of interaction. The platform reduces turnaround times by accelerating the identification of client needs and enabling faster follow-up and coordination. Personalization is strengthened through deeper understanding of client circumstances, reinforcing trust and relationship depth. Notable outcomes include identification of opportunities to reduce borrowing costs, drive significant asset inflows, and support compliance-related client needs, demonstrating the platform's ability to translate insights into tangible financial and advisory outcomes.

KEY VENDORS	The solution leverages Microsoft Azure tools alongside multiple undisclosed third-party data providers, including enabling the aggregation and analysis of diverse data sources to generate actionable insights.
READ MORE	Please visit Celent.com to learn more about this initiative.