

AI is transforming financial planning

8,095 financial planners surveyed May - July 2026

SECOND ANNUAL GLOBAL STUDY

Financial planners worldwide are using AI to improve efficiency and serve more clients. ➤



Adoption has accelerated

8 in 10

financial planners

report their firm is using AI or planning to within 12 months, up from 6 in 10 in 2025



Broadening access

70%

expect AI to **increase access** for underserved populations, up from 60% in 2025

68%

expect it to **reduce the cost** of advice, up from 59% in 2025



What financial planners need next

50%

want **more training** in data analysis and interpretation

34%

say **education and training** matter most for safe, responsible AI use



Increasing capacity

93%

of financial planners say AI has improved their **work efficiency**

52%

report increased **operational efficiency**

49%

can **serve more clients**



Improving client service

83%

say AI will help them **better serve clients**, up from 78% in 2025

75%

say AI will improve the **quality of advice**, up from 60% in 2025



Clients are already using AI

33%

of financial planners report their clients use AI for general **financial education**

25%

say clients use it to **validate or compare** advice

Source: FPSB's 2026 Impact of AI on Financial Planning Global Research

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