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**WELA ANNOUNCES INTEGRATION OF BENJAMIN® WITH FINANCIAL INDUSTRY CRM LEADER WEALTHBOX®**

**ATLANTA, GA** (July 11, 2019) Today, Wela announced the integration of Benjamin®, a digital assistant for financial advisors, with Wealthbox®. Benjamin is technology built by financial advisors for financial advisors to augment best practices, create efficiencies, and deepen client relationships. Wealthbox is one of the leading CRM applications for financial professionals. The integration of these two technologies promises to deliver an exceptional experience for financial advisors.

According to Matt Reiner, CEO of Wela, “A core technology in the current advisors’ technology stack is the CRM system, and Wealthbox is a leader in CRM services for financial advisors. With an innovative focus and a desire for open architecture, Wealthbox is allowing technologies like our Benjamin to integrate and expand the value of their software to current and future users.”

"We welcome Wela and their digital assistant technology into Wealthbox’s growing ecosystem,” said Wealthbox Product Specialist Chris Kopanski. “Our products complement each other and help financial advisors work smarter and faster.”  
  
Tasks currently possible through the Benjamin/Wealthbox integration are:

* Scheduling client meetings - Benjamin reads the last client meeting date via Wealthbox and is able to communicate with the client directly via text, email, or both to get the meeting scheduled and confirmed.
* Simplification of note taking – Benjamin can also ensure that notes from client meetings get added into the CRM. Benjamin reaches out to advisors after client meetings and uploads the notes whether written or voice dictated. This allows advisors to enter notes on the go and alert team members as to what was discussed and what further action is needed.
* Simplify on-boarding workflow - Currently, it's a job for someone on an advisor’s team to be assigned a task, check the custodian for new accounts or new funding, alert the client, create a task for the advisor, and then monitor again. Via this integration with the custodian and Wealthbox’s CRM, Benjamin can complete all of these tasks while alerting the appropriate people on the team when these tasks are completed (ex. accounts opened or funded). This can all be done while alerting the client if desired.

For more information, visit [www.GetWela.com](http://www.getwela.com).To schedule an interview or for questions about this technology, e-mail Andrea Rizk at [andrea@rizkpr.com](mailto:andrea@rizkpr.com).

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**About Wela:** Wela is a financial technology company that is focused on creating solutions that enable advisors to scale their teams, deliver more value to clients and grow profit margins. As financial advisors with their own successful RIA firm, the founders of Wela set out to create the industry's first ever digital assistant, Benjamin™, to eliminate menial tasks that were bogging down their valuable human resources. Benjamin™ leverages an advisors current technologies and process and just adds a digital team member to the mix. For more information visit http://www.getwela.com.  
  
**About Wealthbox:** Wealthbox is a web-and-mobile CRM application designed for financial advisors. For a free 30-day trial go to [http://www.wealthbox.com](http://www.wealthbox.com/).