

# Savvy Wealth Raises \$72M Series B Led By Industry Ventures

Client News

July 3, 2025

Gunderson Dettmer represented client Savvy Wealth, a technology platform provider for registered investment advisors (RIAs), in its \$72 million Series B financing led by Industry Ventures, with participation from Vestigo Ventures, Euclidean Capital, Canvas Ventures, Thrive Capital, The House Fund and Brewer Lane Ventures.

Savvy is a largely automated and AI-driven platform that helps RIAs offload administrative work, improve client interaction and provide sophisticated investment management tools. The new capital will be used to expand its product and engineering teams and innovate in areas such as artificial intelligence integration.

In the [announcement of the transaction](#), Savvy Wealth founder and CEO Ritik Malhotra said, “AI is disrupting financial advice, but not in the way that many have predicted. Rather than replacing advisors, it’s amplifying their ability to deliver highly personalized and deeply human client experiences. At Savvy, we’re embedding AI inside the core of our CRM and advisor-facing tech stack to ‘10x’ their capabilities – unlocking predictive, real-time insights that strengthen human relationships.”

The Gunderson deal team was led by Colman Lynch and included Sam Feldman, Lawrence Ho and Jaime Lacson.

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[Euclidean Capital](#)

Canvas Ventures  
Thrive Capital  
The House Fund  
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