

Chantico Technology and Copia Wealth Studios—Strategic Partnership to Bring Scenario Modeling to Complex Portfolios

Integration targets family offices holding illiquid assets alongside traditional investments



Los Angeles, California Jun 10, 2025 ([IssueWire.com](https://www.IssueWire.com)) - Chantico Technology, a leader in machine learning scenario modeling, and Copia Wealth Studios, an AI-powered wealth management platform, today announced a partnership to integrate Chantico's scenario modeling with Copia's wealth data platform. The combined offering addresses a specific challenge: stress-testing portfolios that mix traditional securities with private equity, real estate, and other alternative investments.

This collaboration integrates Chantico's advanced scenario modeling capabilities with Copia's comprehensive wealth intelligence platform, delivering a unified solution that enhances decision-making across diverse asset classes.

Empowering Smarter Investment Decisions

Chantico's flagship platform, Caminos, specializes in translating complex financial data into intuitive narratives, enabling investors to understand the factors impacting their portfolios. By integrating with Copia's wealth operating system, which aggregates and validates investment data from multiple sources, users can now access a holistic view of their assets, including alternatives and illiquid investments.

"Many portfolio platforms show you what you own but fail to help you understand what could happen to it," said Gina Sanchez, CEO of Chantico Technology. "Copia has the data layer. We have the

simulation layer. The combination gives investors valuable foresight."

Enhancing Portfolio Intelligence

Michael J. Sikorsky, CEO of Copia Wealth Studios, noted the partnership advances their platform's capabilities: *"We've brought \$30 billion in Assets Under Intelligence® and adding Chantico's scenario modeling means clients can game out market shifts before they happen. When half your wealth sits in alts, that predictive power becomes superpower magic."*

The partnership targets a growing pain point in wealth management: as investors shift toward alternative assets for returns, their ability to assess portfolio-wide risk deteriorates. Standard modeling tools often ignore illiquid holdings or treat them too simplistically.

Financial terms of the partnership were not disclosed. The integrated solution will be available to existing Copia clients in Q3 2025, with broader availability planned for Q4.

About Chantico Technology

Chantico Technology builds tools that decode complexity in investment management. Its flagship product, Caminos, delivers next-generation scenario modeling and portfolio optimization—enhancing clarity, precision, and performance without disrupting existing systems. For more information, visit www.chanticotechnology.com or email press@chanticotechnology.com.

About Copia Wealth Studios

Copia Wealth Studios is a San Diego, California-based wealth management platform that leverages AI to provide comprehensive insights into complex portfolios. Serving family offices and institutions, Copia's platform aggregates data across various asset classes, enabling enhanced decision-making. For more information, visit www.copiawealthstudios.com or email press@copiawealthstudios.com.

Media Contact

Chantico Technology

*****@chanticotechnology.com

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