Wealth Management Case Study: Effective Risk Reduction at Scale

In modern wealth management, protecting clients means reducing digital exposure,before fraud ever reaches their account.

Executive Summary

A leading financial services institution with hundreds of thousands of customers partnered with Hush to address rising cases of client-targeted fraud. Despite strong internal awareness programs, the institution faced challenges in protecting clients from identity theft and digital threats—leading to reputational concerns and customer dissatisfaction. By integrating Hush's AI-powered privacy platform, the firm successfully reduced client exposure, enhanced customer confidence, and strengthened its overall risk posture, without compromising privacy or compliance.

Client Profile

A major U.S.-based wealth management and financial services institution, serving a large and diverse client base. With a reputation for reliability and scale, the organization is committed to safeguarding its customers' financial well-being in an increasingly hostile digital environment.

Challenges Faced

As identity theft became the fastest-growing crime in the U.S., the institution saw a steep rise in fraud attempts targeting its client base. These attacks resulted in:

- Direct financial losses for affected clients
- Erosion of customer trust, with some blaming the institution
- Heightened reputational risk, despite strong internal safeguards

While the firm had long invested in client security education and awareness campaigns, these traditional efforts were no longer enough to keep pace with evolving threats.

The institution urgently needed a solution that could:

- Proactively identify digital vulnerabilities before they were exploited
- Respect client privacy while offering real, measurable protection
- Support both clients and frontline employees, particularly those in client-facing roles
- Scale without friction, ensuring ease of use across a large customer base

Solution: Implementing Hush

The institution turned to Hush to provide a dual-track solution:

1. Employee Protection	2. Client Empowerment
Protecting client-facing employees, who often serve as the first line of defense and were also vulnerable to impersonation or targeting.	Empowering clients directly with tools to identify and remove their personal data online, reducing their exposure to phishing, scams, and social engineering.

Hush's AI-powered platform identified publicly available information tied to each client, surfaced digital risk across various vectors, and enabled clients to "hush" or suppress their data—all without sharing client data back to the institution, maintaining strict privacy and compliance standards.

Results

Reduced Vulnerabilities

Significant reduction in client vulnerabilities across the population using Hush

Decreased Fraud Attempts

Decreased volume of fraudulent solicitations and scam attempts reported by clients

Improved Satisfaction

Improved customer satisfaction, driven by both enhanced digital privacy and the trust built by the institution offering this protection as a benefit

Strengthened Brand Loyalty

Strengthened goodwill and brand loyalty, positioning the institution as a leader in client-first privacy and fraud prevention

Conclusion

In an era where fraud is outpacing traditional crimes, this financial institution took bold steps to protect its clients in a scalable, privacy-conscious way. By extending digital protection beyond the organization and directly into the lives of its customers, the firm not only reduced risk—but also **elevated its reputation as a proactive, client-first institution**.