

NEWS | FINANCIAL SERVICES

Hamachi.ai Secures U.S. Patent for Privacy-First Agentic AI in Wealth Management

The patent covers secure, compliant multi-agent AI communications designed to protect sensitive client data while enabling financial advisors and asset managers to adopt generative AI.

By **Ankit Kankar** | September 13, 2026



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Hamachi.ai (“Hamachi”), a regulatory-first, AI-powered Wealth Intelligence Platform built for investment advisors and asset managers, today announced it has been awarded U.S. Patent No. 12,641,064, covering agentic artificial intelligence systems and methods for secure, compliant, multi-agent LLM-assisted networked communications. The newly issued patent reinforces Hamachi’s position as a privacy-first AI platform for regulated financial communications.

“This patent reflects the architecture we have been building from day one: privacy-first, compliance-aware and purpose-built for the way advisors actually work.” - Mike Wilson, CEO, Hamachi.ai

Generative AI adoption is accelerating across financial services, but most general-purpose AI tools were not designed for the realities of wealth management. Advisors and firms routinely work with account statements, tax forms, trust documents, CRM records, portfolio holdings, household information, notes and other highly sensitive client data – exactly the kind of information Hamachi believes should not be uploaded directly into general-purpose AI tools without a purpose-built privacy, redaction, compliance and audit layer.

Hamachi built its platform around a clear principle: client personally identifiable information (PII) should not be the price of using AI. The company’s architecture is designed to identify and redact PII and sensitive financial data before it reaches downstream LLMs, while preserving enough context for the AI to generate useful, personalized and compliant communications. Hamachi then supports secure restoration, compliance review, audit logging and workflow integration inside the advisor’s existing environment.

While enterprise AI offerings and zero-retention settings can reduce certain risks, Hamachi believes regulated firms need a stronger architectural standard. Sensitive client data should be minimized, redacted or tokenized before it is ever exposed to a model environment.

“AI is going to transform wealth management, but the industry needs a safer default,” said **Mike Wilson**, CEO and co-founder of Hamachi. “Account statements, tax forms, trust documents, CRM records and portfolio data should not be casually uploaded into general-purpose LLMs. Sensitive client data should be protected before the model ever sees it. This patent reflects the architecture we have been building from day one: privacy-first, compliance-aware and purpose-built for the way advisors actually work.”

The patent covers core components of Hamachi's secure, compliant, multi-agent AI communications architecture, including the ability to ingest data from email, CRM and other enterprise systems; preserve workflow context; redact personally identifiable information before downstream LLM processing; orchestrate specialized AI agents based on communication context; generate LLM-assisted drafts; review outputs for errors, omissions and compliance issues; and support compliance gating, remediation and audit logging. The patent reinforces Hamachi's commitment to building AI infrastructure for regulated environments rather than layering general-purpose AI tools on top of sensitive workflows.

"As a financial services firm, we are excited about the productivity potential of AI, but we also have to be thoughtful about client privacy, supervision and regulatory expectations," said **Aaron Spradlin**, chief technology and security officer at United Planners. "Hamachi's approach resonates because it is not asking advisors to choose between innovation and control. It is bringing AI into advisor workflows with the privacy and compliance architecture firms like ours need."

The newly issued patent is the first in what Hamachi expects to be a broader patent portfolio covering privacy-first, compliance-aware agentic AI systems for wealth management and other regulated industries. With additional patent applications pending, Hamachi is continuing to protect the infrastructure it believes will define safe, responsible AI adoption across regulated financial services.

To learn more about adopting AI without exposing sensitive client data, visit [Hamachi.ai](https://hamachi.ai), or request access to Hamachi's private beta.

Read online: <https://worldbusinesswatch.com/news/17/133/hamachi-ai-secures-u-s-patent-for-privacy-first-agentic-ai-in-wealth-management.html>

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