THE BATEAU GROUP

Clarity in a complex world.

Practical AI for wealth firms, built alongside your team.

Strategy that ships: working software and decisions, not slide decks. Led by Jason Gerard, who has built digital wealth platforms at JPMorgan, Capital Preferences and Anchorage Digital.

THREE WAYS TO WORK TOGETHER, EACH STANDS ON ITS OWN

WHEN YOU NEED A STARTING POINT

AI Opportunity Assessment

4 weeks

Find where AI will pay off first across operations, advisors and clients.

- Interviews with leaders, advisors and operations
- Workflow and data review
- Ranked AI use cases with estimated payoff
- Readout and 90-day plan

You get: a prioritized AI roadmap your leaders own.

WHEN YOU'RE READY TO BUILD

60-Day AI Pilot

2 months

Take one high-value use case from idea to a working prototype your team can test.

- Use-case selection with your leaders
- Build-vs-buy and vendor shortlist
- A working prototype on sample data
- Guardrails and rollout plan

You get: a prototype and a clear go/no-go decision.

WHEN YOU WANT ONGOING SUPPORT

AI Leadership Partner

2-month minimum

A part-time, experienced builder working alongside your product, technology and operations leaders.

- Accelerates your AI roadmap
- Prototypes new use cases hands-on
- Evaluates AI vendors and tools
- Trains your team to run it

You get: more AI delivered, without adding headcount.

How engagements start: we recommend a 60-day pilot. Scope is confirmed in writing before we start.

Built for RIAs, family offices, broker-dealers and wealthtech firms that need modern platforms and practical AI.

Let's chart a better course.

The Bateau Group, LLC

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FOUNDER & PRINCIPAL

Jason Gerard

Jason is a product executive who builds digital products for banks and wealth management firms. At JPMorgan he rose to Executive Director, leading 150 technologists across the U.S., Europe and Asia. He later served as Chief Product Officer at Capital Preferences and led the wealth platform at Anchorage Digital.

A hands-on builder who ships software with AI every day, he founded The Bateau Group to help wealth firms put AI to work. He is also a U.S. Army veteran.

SELECTED WORK

Operations automation · JPMorgan
Led a Private Bank automation program with 150 developers, freeing 210 roles of manual work and lifting key processes from 30% to 96% straight-through.

Client service · JPMorgan
Led internal teams and SugarCRM's vendor team to deliver Private Bank case management for tracking and resolving client requests.

Digital banking · Chase
Product owner for Digital Account Opening and the Chase Digital Assistant.

Private markets · Capital Preferences
Delivered a private markets proposal platform for Apollo.

Wealth platform · Anchorage Digital
Shipped client onboarding, connected the wealth app to the trading desk, and launched a third-party strategy for a wealth client.

Hands-on AI builds · The Bateau Group
Designs and ships AI-powered software himself, including iOS apps built in Swift with Claude Code.

Clarity over complexity
If it isn't helping your team get something done, it doesn't ship.

Builder, not just advisor
Recommendations come with working prototypes.

Yours to keep
You own the work, and your team knows how to run it.

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