

NEXTFI ADVISORS

## Strategic advisory for the next generation of financial institutions.

We help banks, asset managers, funds, and fintechs **design, govern, and operationalize** AI and digital-asset strategies — translating innovation into commercially viable, regulator-ready, operationally durable capabilities.

### 01 Who we serve

Senior leaders inside regulated institutions navigating AI and digital-asset transformation

#### Banks

Risk, technology, payments, and digital-asset leadership at globally significant and regional institutions.

#### Asset & Wealth Managers

CIOs, COOs, and product heads exploring tokenized funds, on-chain distribution, and AI-driven workflows.

#### Investment Funds

GPs and platform builders structuring real-world assets, tokenized credit (including private credit), and on-chain operating models.

#### Fintechs & Infrastructure

Payments, stablecoin issuers, custodians, and market-infrastructure firms scaling under new regulation.

### 02 Where we help

Four advisory pillars across the next-generation financial stack

#### PILLAR 01

##### AI Strategy & Governance

From model risk to **agentic AI**. Strategy, control-plane design, and regulator-ready governance for institutions deploying AI at scale.

- Enterprise AI strategy and operating-model design
- NIST AI RMF, EU AI Act, SR11-7, DORA alignment
- Agentic governance: permissions, memory, tool boundaries

#### PILLAR 02

##### Digital Assets & Tokenization

Tokenized funds, **real-world assets**, and **private credit on-chain** — strategy, structuring, custody, and operating-model design.

- Tokenized fund and RWA product design
- Custody, transfer-agency, and on-chain ops architecture
- Private credit and structured-credit tokenization

#### PILLAR 03

##### Stablecoins, Payments & Market Infrastructure

Stablecoin issuance and treasury, cross-border payments, and how new rails **coexist with SWIFT and card networks**.

- Stablecoin strategy under the GENIUS Act and MiCA
- Cross-border payment-rail design and partner selection
- Treasury, reserve management, and disclosure frameworks

#### PILLAR 04

##### Executive Intelligence & Implementation Readiness

Board and C-suite briefings, market scans, and **implementation roadmaps** that move strategy into delivery.

- Board and risk-committee briefings on AI and digital assets
- Market scans, competitor intelligence, and option papers
- 90-day remediation and implementation roadmaps

### 03 How we work

Senior, focused, and built for executive decision cycles

#### PRINCIPAL-LED

##### Senior practitioners do the work.

No leveraged pyramid. Every engagement is led by a senior advisor who has sat across the table from regulators, boards, and engineering teams.

#### REGULATOR-READY

##### Output a board can defend.

Findings, memos, and roadmaps written for risk committees and supervisors — not slideware. Every recommendation is sourced and sized.

#### CROSS-DISCIPLINARY

##### Strategy meets infrastructure.

We sit between policy, product, engineering, and risk — the only place agentic AI and digital-asset programs actually succeed.

## 04 Selected case studies

*Illustrative client work — every engagement is scoped to the institution*

CLIENT	ENGAGEMENT	RESULTS
Tier 2 US commercial bank	<b>Agentic AI Governance Review for a US Commercial Bank</b>	Surfaced three material governance gaps and delivered a 90-day remediation roadmap — the basis for our standardized agentic AI governance review and diagnostic tool.
Global asset manager	<b>Tokenized Share Class Operating Model for a Fixed-Income Strategy</b>	An executive-ready operating model used to drive internal debate, regulatory dialogue, and vendor engagement on a tokenized share class.
B2B cross-border payments provider	<b>Stablecoin Strategy for a Cross-Border Payments Platform</b>	A quantified view of stablecoins as a competitive lever, with a low-risk pilot design and partnership model the leadership team could act on.
Global asset manager	<b>Institutional Demand Intelligence for Tokenized Funds</b>	Built conviction around real institutional demand, priority segments, and structures for tokenized fixed-income and private-credit products.
Web3 infrastructure company	<b>RWA Tokenization Partnership &amp; Distribution Strategy</b>	Reframed RWA tokenization as a path into institutional markets — a partnership and execution plan ready for investor discussions.

## 05 The NextFi platform

*Where our research meets our practice*

### NEXTFI INTELLIGENCE

#### Research, briefings & market scans.

Practitioner-led research on stablecoins, tokenization, private credit, payments, and AI governance — for senior leaders who need a defensible point of view, fast.

- Weekly executive briefings and option papers
- Deep-dive sector and regulatory reports
- Cited directly inside our advisory work

[intelligence.nextfiadvisors.com](https://intelligence.nextfiadvisors.com)

### AGENTIC AI GOVERNANCE REVIEW

#### From AI policy to AI infrastructure.

A free diagnostic plus a fixed-scope engagement that closes the gap between “we have an AI policy” and governance encoded in the control plane.

- 24-question diagnostic, instant tier score
- Four-lens framework: control plane, regulation, risk, agentic failures
- Regulator-ready findings + 90-day roadmap

[agentic.nextfiadvisors.com](https://agentic.nextfiadvisors.com)

### SIGNALS FROM THE STREET · SFTS

#### The institutional migration to blockchain infrastructure.

A live intelligence feed filtering the noise so leaders can see how banks, exchanges, intermediaries, and regulators are building next-generation markets infrastructure.

- Signal catalogue and initiative directory
- Country directory, charts, and methodology
- Decision playbooks: signals → strategic options

[streetsignals.nextfiadvisors.com](https://streetsignals.nextfiadvisors.com)

### COMPANION THESIS

**The Great Displacement · Convergence Economy** — when intelligence and coordination costs collapse simultaneously. The institutional research thesis underpinning our advisory point of view. By Barry Eisenberg, Managing Principal (March 2026). [thedisplacement.ai](https://thedisplacement.ai)

### START A CONVERSATION

#### Schedule a strategic review.

A 30-minute call with the Managing Principal — walk through your stack, your roadmap, and where governance, infrastructure, or strategy needs to evolve.

[nextfiadvisors.com](https://nextfiadvisors.com)

### READ OUR RESEARCH

#### NextFi Intelligence.

Briefings on stablecoins, tokenization, AI governance, and market infrastructure.

[intelligence.nextfiadvisors.com](https://intelligence.nextfiadvisors.com)

### RUN THE DIAGNOSTIC

#### Agentic AI Review.

24 questions, ~10 minutes, instant tier score. Your data stays in your browser.

[agentic.nextfiadvisors.com](https://agentic.nextfiadvisors.com)