saturn

Financial Advice unlocked

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The true potential of AI lies in its ability to amplify human creativity and ingenuity.

Gini Rometty, IBM

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Intentions

01

To bring realism to the AI conversation

02

To explore the problems AI can solve for us in our industry

03

To excite you about the future

04

To introduce Saturn and show you what we do

The State of Play

Financial Planning Industry

- Want to help more people
- Excited but also anxious about tech

The Barrier

- Inefficient Processes
- Broken Systems

The Opportunity

- Leading the Pack
- The Great Wealth Transfer

The fork in the road…

AI

"AI won't replace people, but maybe people that use AI will replace people that don't."

Andrew Ng, Google

Automate the mundane

Drive efficiency

Hyper-personalisation at scale

Improve access to data

Improve advice processes

Improve outcomes for clients

If you had a clean slate, what would your business look like? like?

People, Proposition, Processes and Tech

The future of the industry, from the industry

People

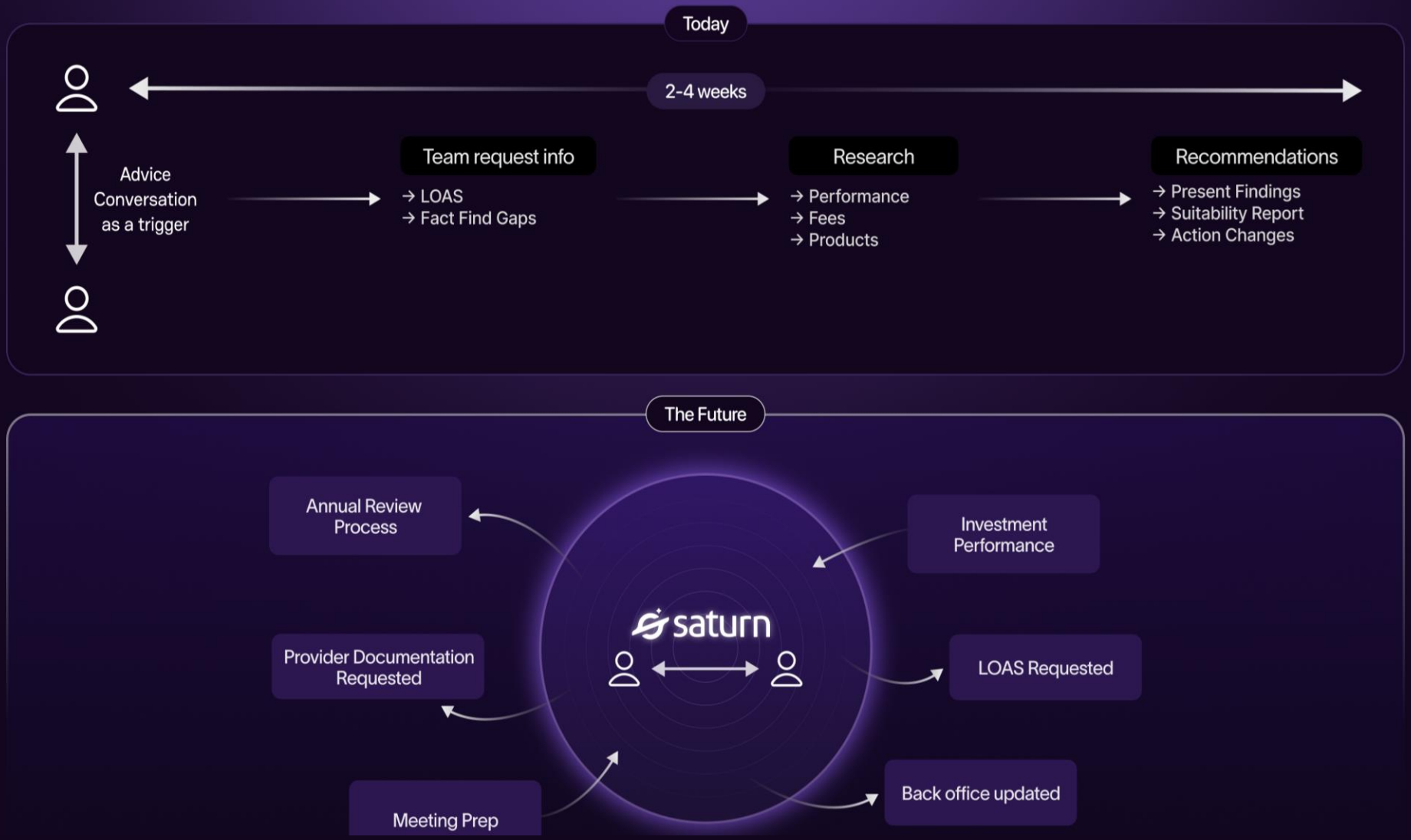
- Relationship Management (BDMs/AMs)
- Marketing (Branding and content)
- Technology (CTO/Developers)

Proposition

- Seamless Onboarding
- Multi-proposition approach
- Super charge account management

Processes

- Streamline advice process
- Automate compliance reporting
- Clear client journey (Prospect to Key Account)


Today
2-4 weeks
Advice Conversation as a trigger
Team request info
→ LOAS
→ Fact Find Gaps
Research
→ Performance
→ Fees
→ Products
Recommendations
→ Present Findings
→ Suitability Report
→ Action Changes
The Future
Annual Review Process
Investment Performance
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Provider Documentation Requested
LOAS Requested
Meeting Prep
Back office updated

Live and in Preview

Meeting Notes

In-person and online

Integrations Live

Ingestion and pushing data

Training and Compliance

Custom to firm

Unlimited Secure Doc Storage

Custom to firm

Suitability Letters BETA

Annual Review, Fund Switches, Top Ups

“

AI won't replace Financial Advisers, but
but maybe Financial Advisers that use AI will
AI will replace those that don't.

Tom Hind...

Live Demo

efficiency delivered.
with care.