

8 AI TOOLS FOR FINANCIAL PLANNERS



Financial Planners
spend **30 - 40%**
of their time
on admin

Imagine getting that back...



Hello!



“Everything I do is non-technical”

- Used AI to drive \$75m client sales in 2022–2023
- Part of the ISO committee for AI and cyber security in education globally
- AI advisor to UK government and local authorities
- Regularly featured in Forbes Magazine in the AI space
- Actively working with brands like Toyota, Mitsubishi, Google
- International AI speaker and consultant
- Top 5 MarTech influencer globally, with 62k LinkedIn followers and 33k newsletter subscribers.

Heather Murray,
Founder at AI for Non-Techies



**Artificial
Intelligence**

Machine Learning

Predictive text, email
spam filters, Netflix

Deep Learning

Facial recognition, Siri,
Alexa, Netflix

Generative AI

ChatGPT, Midjourney



LLMs

WE'RE TALKING ABOUT GEN-AI

1. Claude



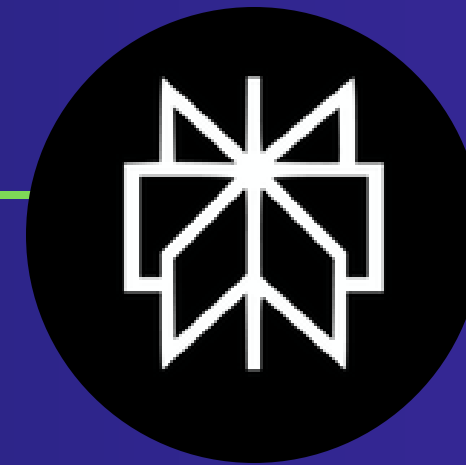
Multiple useful prompts

2. ChatGPT



Custom GPTs

3. Perplexity



Research and analysis

4. NotebookLM



Build client hubs

5. Circleback



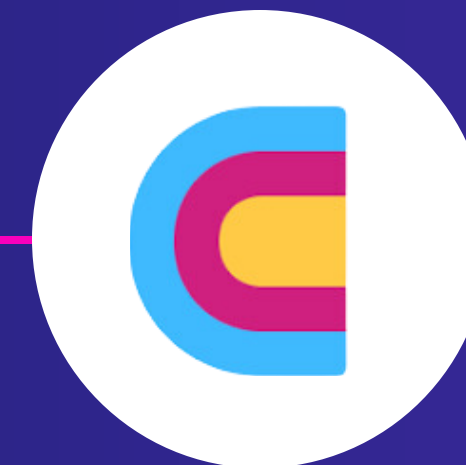
AI note taking

6. Humantic



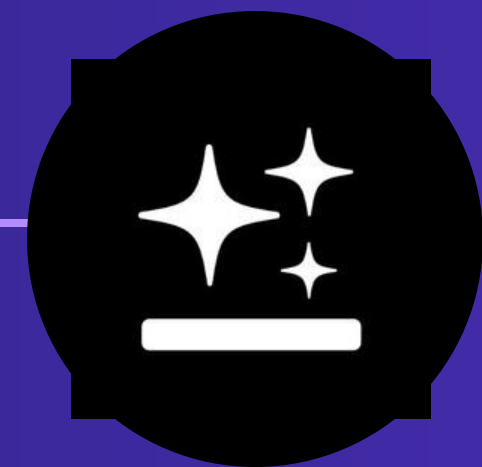
Analysing clients and partners

7. Clay



Building lead lists

8. Genspark AI



SuperAgent

Use Cases for Financial Advisers



Client Work

- Hyperpersonalised Client Advice
- Client Knowledge Hubs
- Automated Client Reporting
- Personalised Customer Service



Marketing

- Ideating and Creating LinkedIn Posts
- Writing Articles for Industry Magazines
- Email Outreach Sequences



Document Analysis

- Analyse market reports
- Summarise long reports and videos



Sales

- Create strong new service offers
- Build calculators and tools easily
- Rehearse difficult client sales calls
- Sales call to proposal generation



Other

- Risk assessments
- Regulatory policy monitoring/updates
- Financial/market news updates
- Client sentiment analysis

And a few that are here today:

Advisory AI



Firenze



Marloo



Otto



How to Find New Tools

Social Media



Drew
Brucker



Jonathan
Parsons



Audrey
Chia



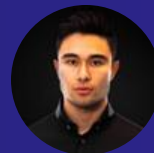
Isabella
Bedoya



Jodie
Cook



Matt
Wolfe



Rowan
Cheung

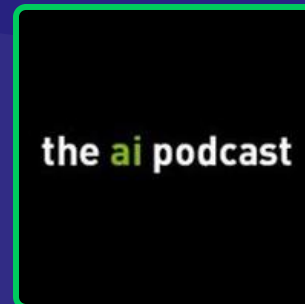
Podcasts



The Artificial Intelligence Show
Paul Roetzer & Mike Kaput



The TED AI Show
Bilawal Sidhu



The AI Podcast
Nvidia



Everyday AI Podcast
Jordan Wilson

Tool Finding Sites



FutureTools



Futurepedia

Newsletters



MINDSTREAM



Ben's Bites



The Rundown



FutureTools

RISKS and Limitations



AI has a lot of risks if not used carefully.



Bias



**Data
privacy**



Hallucinations



Plagiarism

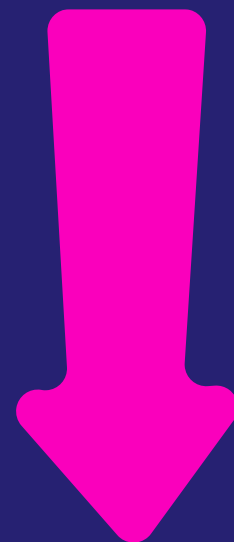
GenAI is Not:

- ✗ The **answer** to every problem
- ✗ **Flawless** technology
- ✗ As **intuitive** as it seems
- ✗ Able to work **on its own**

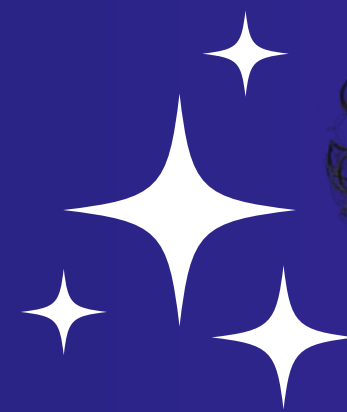
GenAI is:

- ✓ A very **powerful tool**
- ✓ Going to **transform** how we all work
- ✓ A way to **optimise** and **deepen** what we do
- ✓ An incredibly **intelligent, personal assistant**

Come and grab a brochure



Play.
But play
carefully



Thank you

Any Questions?

