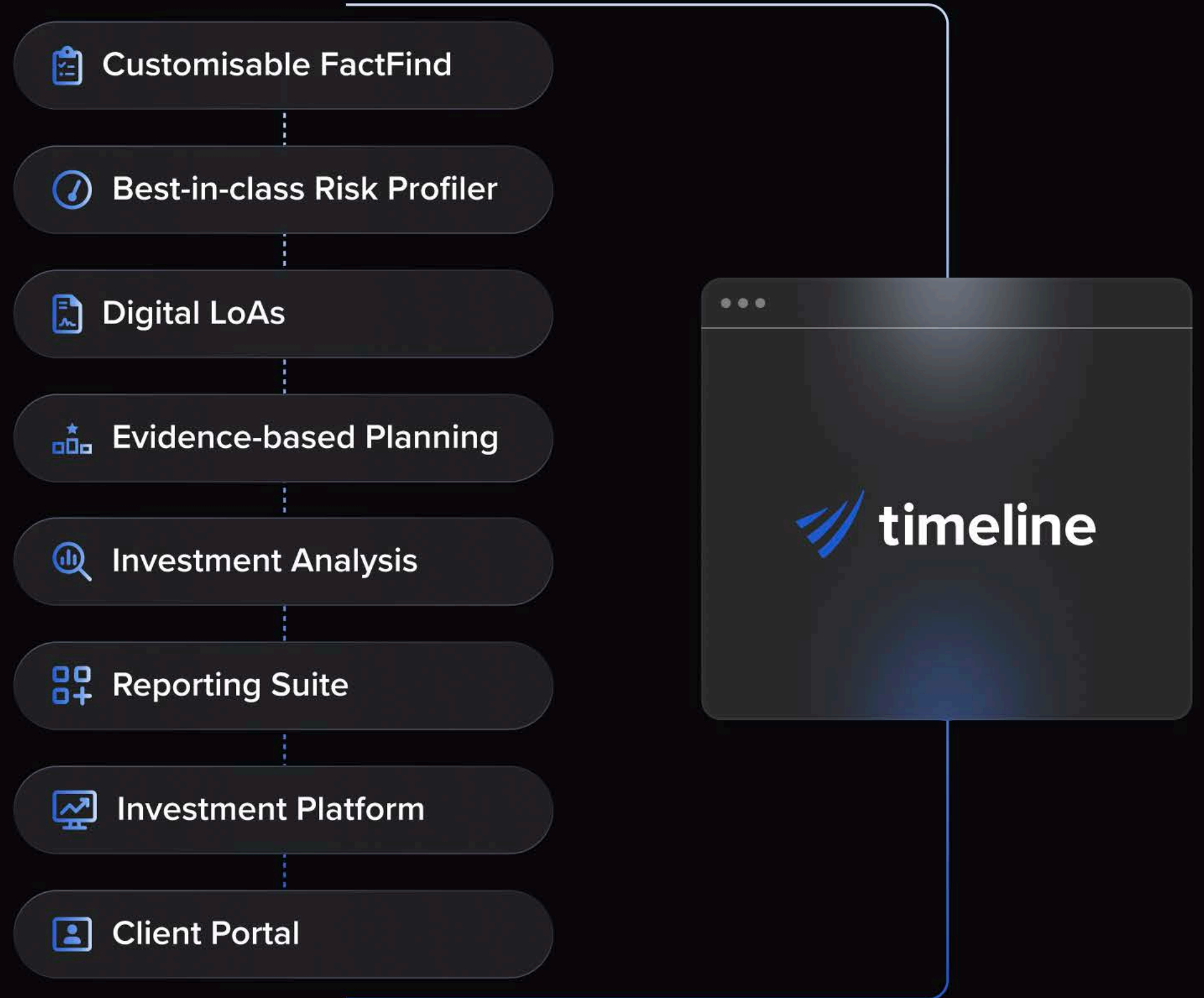




All-in-One Software for Financial Advisers







Reporting Suite



Investment Platform



Client Portal beta



Customisable FactFind



Best-in-class Risk Profiler



Easy KYC & AML



Digital LoAs



Evidence-based Planning



Investment Analysis



Modular Reporting Demo

Platform Demo

Client Portal Demo



AI

**In a world filled with AI, being human will
never be more valuable.**

AI



Better integrations



Your Number Two on tax and plan recommendations



Personalised FactFinds



Your assistant on meeting notes



Personalised reports



Compliance assistant

AI Proof-Of-Concept Backlog

1. Cover letters
3. Updated compliance for reports
6. IHT recommendations
7. Tax efficiency recommendations
8. FactFind - digging deeper into financial details, client goals and their motivations
9. AI Meeting Notes
8. Financial plan creation
9. Financial plan optimisation
11. Client Portal / WhatsApp AI agent (white-labelled)
12. Investment product research and analysis (paraplanning)
13. Agent to action things in Timeline app (e.g. Send a factfind)

AI

Whatever technological advances come along, you will be ready because Timeline will have the answers you need.





This is Platform 3.0
And the future is here!