

## ARTIFICIAL INTELLIGENCE

AI-driven copilot for personalized investment proposals



Allows advisors to anticipate each client's preferences based on financial and regulatory variables, thanks to advanced AI technology.



Engages clients effectively in the advisory process, enabling them to tailor investment proposals to meet their specific needs.



Assists in selecting the most suitable financial products for each client by analyzing key decision-making variables and ensuring compliance with current regulations.



Provides clear and compelling arguments explaining all recommendations delivered to the advisor.

## Features



### PERSONALIZED ADVISING

Customized proposals through a guided process that aids in selecting the most appropriate products for the client based on their preferences and current portfolio.



### AI-DRIVEN RECOMMENDATIONS

Considers both financial and regulatory variables in the decision-making process, ensuring a holistic view of the available product universe.



### TOTAL CONTROL

Considers all current business logic and regulatory compliance in Openfinance's investment proposal flows: ESG, suitability, appropriateness, risk policy, target audience, restrictions, and MIFID III's value for money concept.



### UNIQUE STYLE

Learns from the entity's management model and vision to recommend the most suitable products within its recommended product universe.



### STABILITY

Applies advanced quantitative finance techniques and Artificial Intelligence in product recommendations to ensure more robust investment proposals.



### COMPLETE TRACEABILITY

Provides full access to the history of all investment recommendations and the reasoning behind each decision.

## Advantages for business

### EFFICIENCY & PRODUCTIVITY

- 1 Offers a personalized, scalable, and proactive advisory service that increases advisor effectiveness and allows them to serve more clients.
- 2 Increases advisor productivity and capabilities, resulting in more effective and satisfying customer service.

### CUSTOMER ACQUISITION AND RETENTION

- 3 Improves conversion rates of investment proposals and attracts new clients through personalized and suitable proposals.
- 4 Strengthens trust and bonds with clients through a unique and disruptive solution.

### SERVICE QUALITY

- 5 Empowers advisors with a 360° view driven by AI that incorporates all historical product information, market status, and the entity's vision, in addition to all regulatory constraints.
- 6 Tailors recommendations to each client's unique needs, incorporating the entity's vision to deliver high-quality service.

## Our solution

