

01



Financial advisors spend **8-12 hours** daily for pre and post client reviews

02



It's **costly**, time consuming and tiring

03



Choose wisely on **AI tools** for better assistance and building connections

04



Ask Sam

Meeting Assistant



CogniCor's AI powered Meeting Assistant brings value to their time by reducing the process considerably with intelligent automation

Meeting Assistant simplifies the client review process and performs it with ease and scalability

- Receive Client Review Notifications
- Automatically Generate Agendas Using Standard Templates Based on Previous Meetings
- Predict Next Best Actions Based on Client Portfolio
- Automatically Schedule Meetings and Add Them to CRM
- Efficiently Capture Voice-Based Meeting Notes
- Automated Client Outreach and Follow-Up

05

Agenda



Meeting Summary

During the meeting, Jane and John discussed her financial goals and objective performance of her investment areas for improvement. The planning, retirement planning, and tax planning.

Retirement

retirement planning, risk management, and tax planning.

Create Workflow

For financial advisors, an AI-powered meeting assistant proves invaluable, enabling effortless agenda preparation, real-time note-taking, and swift client reviews. It acts as a reliable reminder, furnishing advisors with a comprehensive overview of upcoming meetings. This automation translates to tangible gains, saving time and resources.

- Elevates Efficiency
- Amplifies Revenue
- Mitigates Advisor Frustration
- Effective Time Management
- Bolsters Business Development
- Enhances Client Satisfaction