About Nevis

Nevis will be the leading Wealth Intelligence Platform for UK and US Financial Advisers. Our goal is to help advisers automate their administrative workflows and help them spend more time focusing on client service and business growth.

About Client Onboarding Workflow

One of the workflows of the Nevis platform will be focusing on the new client onboarding process. We will create a solution to streamline the onboarding process, automate some of the admin steps and provide full visibility, clarity and traceability of a client's onboarding progress to the advisor and their team.

The first step of the onboarding process is called 'Fact find', during which advisers collect necessary information about a future client's financial situation, goals and objectives, risk appetite, family situation, etc. Currently, most companies are doing 'fact find' steps via in-person or zoom meetings. During these meetings, the adviser has a conversation with a future client and asks a set of questions. After that, someone from the advisor's team completes the Customer Information Form (CIF) based on the client's answers and uses notes or recordings of the meeting. Nevis will help to automate this process.

Task

Create an LLM-based pipeline to extract the client's answers to the questions from the transcript of the fact-finding call and automatically complete CIF. Assume the text transcript of the call is provided. Answers to the questions should be extracted in structured data format (e.g. json).

The objectives of the tasks are:
1. Create an LLM-based solution to extract structured data from call transcript (LLM and other related costs can be reimbursed)
2. Evaluate the performance of the proposed solution (*hint*: use synthetic data for performance evaluation)
3. Suggest or implement improvements to the initial solution and evaluate metrics improvements

A suggested format for the home task is Jupyter Notebook + the required data set to run the notebook.

Additional information

Examples of the questions and topics for CIF:

Personal information:
- Full name
- DOB

- Address
- Citizenships

Contact details

Occupation details

Income details

Pension details

Net worth and its structure

Family situation

Financial and life goals

More details are in the attached CIF template.

Note: It is **not** necessary to implement extraction of answers for all questions presented in the attached form. Some representative subset of questions will be enough.