FinancePro

Taking insights about financial data into the AI-age.

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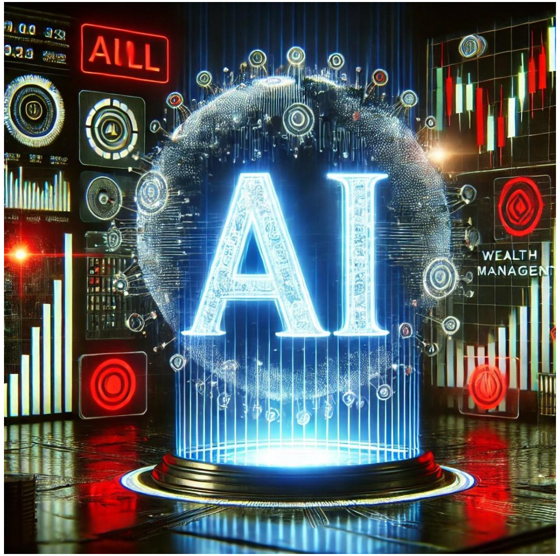
Who would you trust with your money?

Urs
20 yrs in wealth management

VS



Some startup AI tool
est. 2025

The stressful life of a Wealth Manager

CRM tool

PMS tool

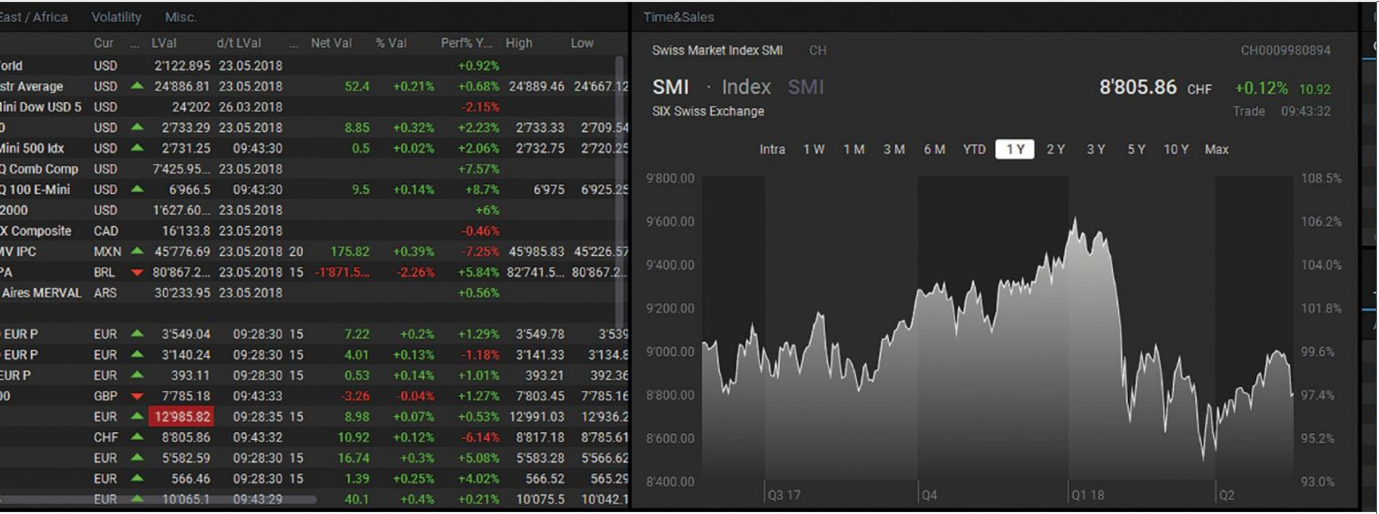
market

newsfeed

scattered dashboards

clients' historical data

Building on SIX's expertise



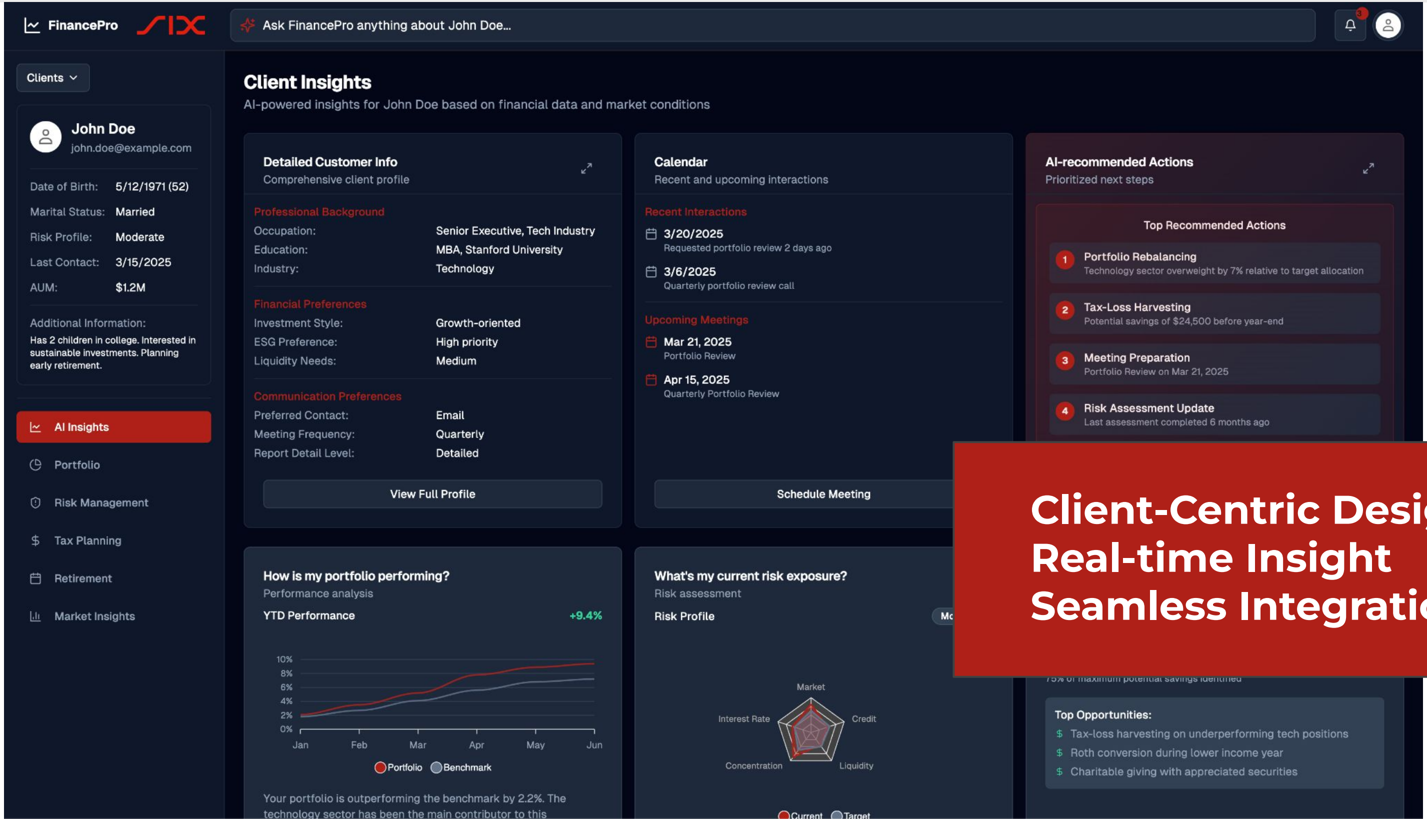
How can we take it to the next level?

A Powerful and Intelligent Display

"SIX iD stands for a high concentration of financial information, which can easily be consumed through an intelligent display. This wealth of rich and exhaustive financial data, readily available at your fingertips, is an absolute advantage in markets where speed of response is crucial."

David de Lame
Product Manager SIX iD
Switzerland

Solution: FinancePro



Client-Centric Design
Real-time Insight
Seamless Integration

Team

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The Next Step

AND

FinancePro

Urs
20 yrs in wealth management

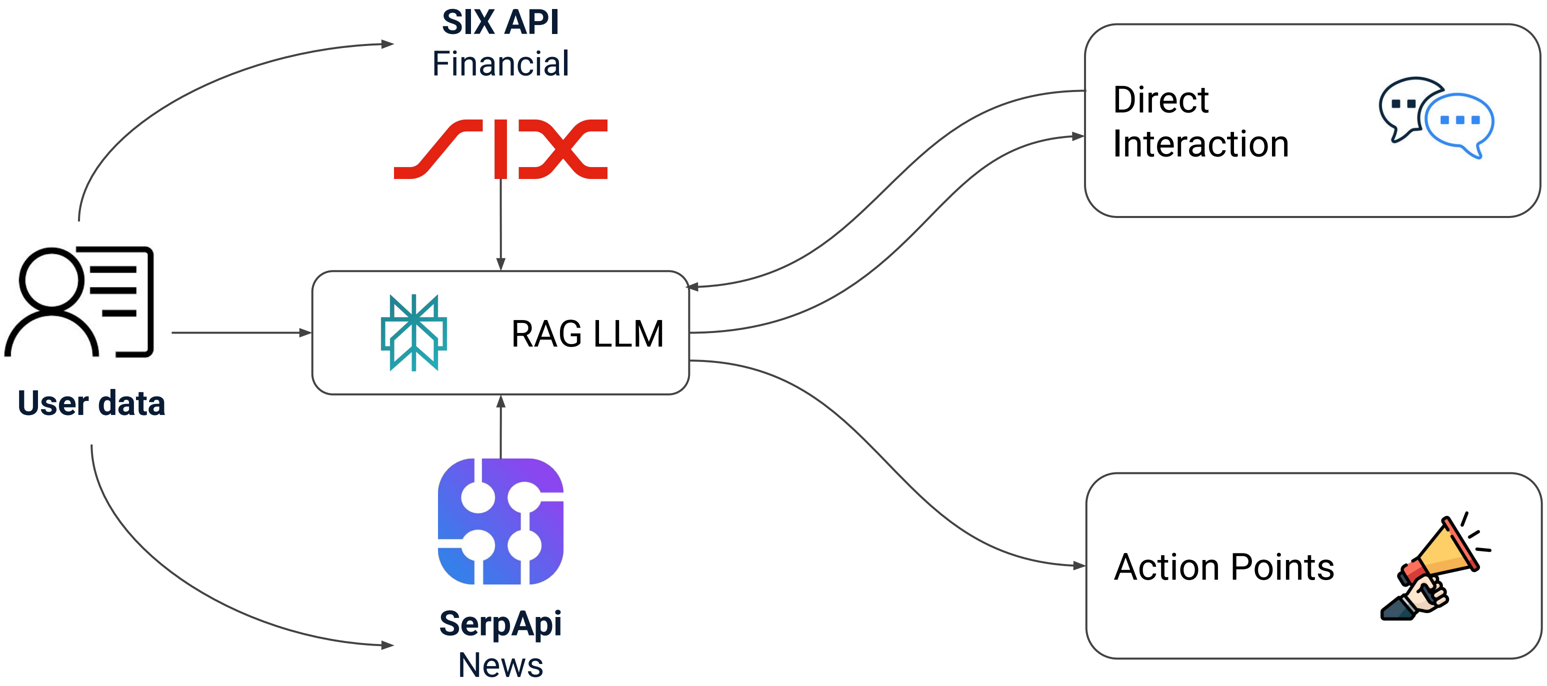
THE startup AI tool
est. 2025

FinancePro

Questions?

If not, spread the word!

Appendix: Under the Hood



Appendix

AI-recommended Actions

Comprehensive Action Plan

High Priority Actions

1. **Portfolio Rebalancing**

   Technology sector is currently at 28%, which is 7% above the target allocation for a aggressive risk profile. Rebalancing would reduce risk and potentially improve risk-adjusted returns.

   - Estimated impact: Medium
   - Recommended timeline: Within 7 days

2. **Tax-Loss Harvesting**

   Identified 3 positions with unrealized losses that could be sold and replaced with similar investments to maintain market exposure while capturing losses. This could save approximately $58,200 in taxes this year.

   - Estimated impact: High
   - Recommended timeline: Before December 15

Meeting Preparation

3. **Business Succession Planning Preparation**

   Upcoming meeting on Apr 10, 2025. Prepare performance reports, portfolio analysis, and discussion materials. Based on previous interactions, client will likely want to discuss retirement planning progress and tax strategies.

   - Estimated preparation time: 45 minutes
   - Recommended timeline: 2 days before meeting

Documentation Updates

4. **Risk Assessment Update**

   Client's risk assessment was last updated 6 months ago. Given recent market volatility and changes in the client's portfolio, an updated assessment is recommended to ensure alignment with current goals and market conditions.

   - Estimated impact: Medium
   - Recommended timeline: Within 14 days

5. **Investment Policy Statement Update**