

# Archived Document Report

## Document Information

Document ID: 14e2fab4-0476-42cf-a33e-4a59157ed01b  
Session ID: bace0dd1-4f62-4596-9443-2407ba3faf9f  
Original Filename: document-1752038151918-936143185.jpeg  
File Size: 1968 KB  
MIME Type: image/jpeg  
Uploaded: 7/9/2025, 7:16:37 AM  
Archived: 7/9/2025, 7:23:13 AM  
Client Advisor: demo\_advisor

## AI Analysis Results

### Summary:

The document is a handwritten advisory meeting note discussing investment portfolio review, address

### Key Points:

- Investment portfolio review
- Address change
- Credit request

### Client Identification:

Names: Client Name  
Account Numbers: CH XXXX XXXX XXXX XX XX  
Location: [Location]  
Financial Amounts: Not applicable

### Extracted Text:

Dear [Client Name],  
Thank you for meeting me today at [Location]. We discussed the following points:  
1. Investment portfolio review: I reviewed your investment portfolio and provided an update on market trends and performance. We will schedule a follow-up meeting to discuss any changes in your investment strategy or goals.  
2. Address change: You mentioned that you have moved to a new address. Please provide me with the updated ID and proof of address so I can update our records accordingly. I will also need to verify the new address before updating it in our system.  
3. Credit request: You expressed interest in obtaining a credit facility for your business expansion plans. I will prepare a structured credit proposal based on your requirements, which we can discuss during our next meeting.  
4. Compliance issue: Please ensure that all transactions and account activities comply with Swiss banking regulations and guidelines. We need to maintain strict compliance standards to avoid any potential risks or issues in the future.  
Please let me know if you have any questions or concerns regarding these points. I look forward to our next meeting.  
Best regards,  
[Your Name]

**Suggested Actions:**

- **CREATE\_CLIENT\_NOTE:** Create a note in the client's profile regarding the investment portfolio review.  
Priority: high
- **PROCESS\_ADDRESS\_CHANGE:** Process the client's address change request.  
Priority: high
- **SCHEDULE\_FOLLOW\_UP:** Schedule a follow-up meeting with the client to discuss any changes in the investment portfolio.  
Priority: medium
- **ORGANIZE\_FOLLOW\_UP:** Organize a follow-up meeting with the client to discuss any changes in the investment portfolio.  
Priority: low
- **PREPARE\_CREDIT\_PROPOSAL:** Prepare a structured credit proposal based on the client's requirements.  
Priority: low