aveni assist

Cut client admin from hours to minutes

Game-changing productivity with an AI-assistant built specifically for financial advisers

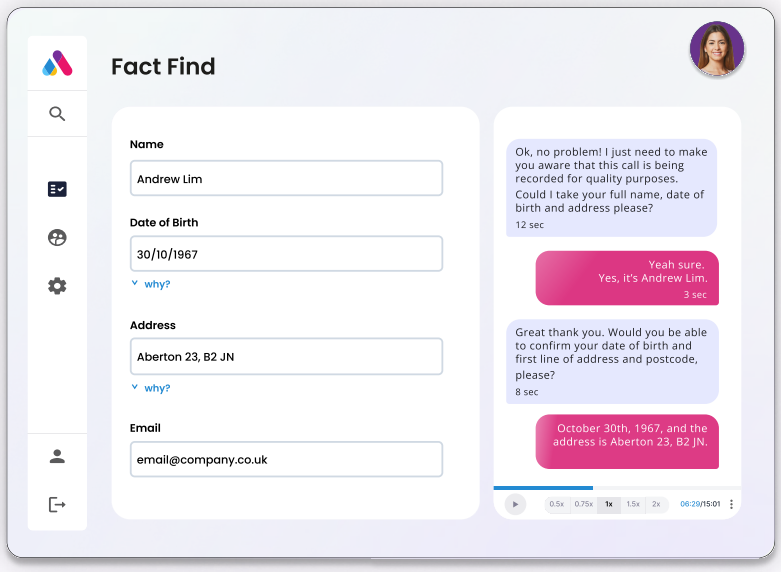


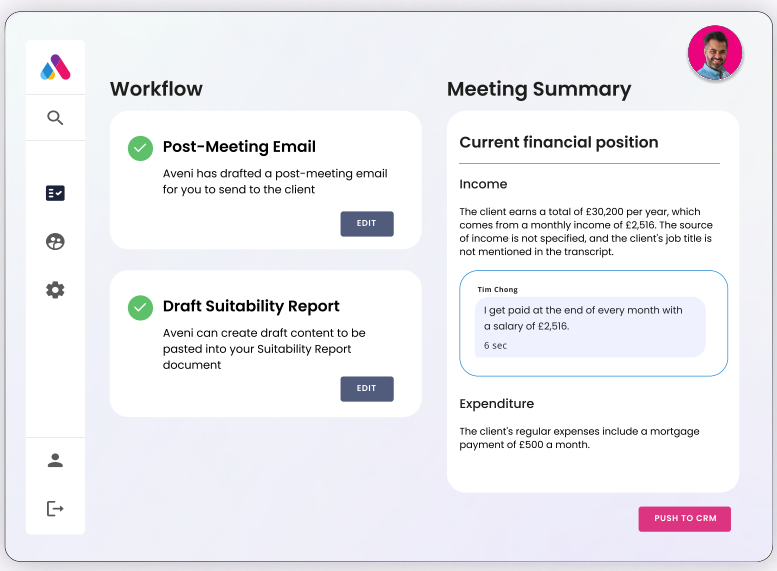
The future of financial advice is here with Aveni Assist, a GPT-powered platform that delivers unprecedented support for advisers and their clients. Seamlessly integrated with MS Teams, Webex and Zoom, Aveni Assist is quick and easy to set-up, accompanying you on every meeting to completely transform productivity, cutting admin from hours to minutes, and allowing you to focus on bringing value.

Save significant time by letting Aveni Assist write your suitability reports, auto-populate your CRM system, brief your admin assistants and create tailored customer emails within minutes of finishing a meeting. With Aveni Assist, your organisation can rest easy knowing the outputs are completely traceable and compliant, ensuring reliability and accuracy for your advisers and clients.

Next-level productivity

Aveni Assist frees financial advisers from the burden of admin, empowering them to focus on their core expertise: client service. It automates CRM administration, generates tailored client communications, and creates financial plans, all with the client at the centre.



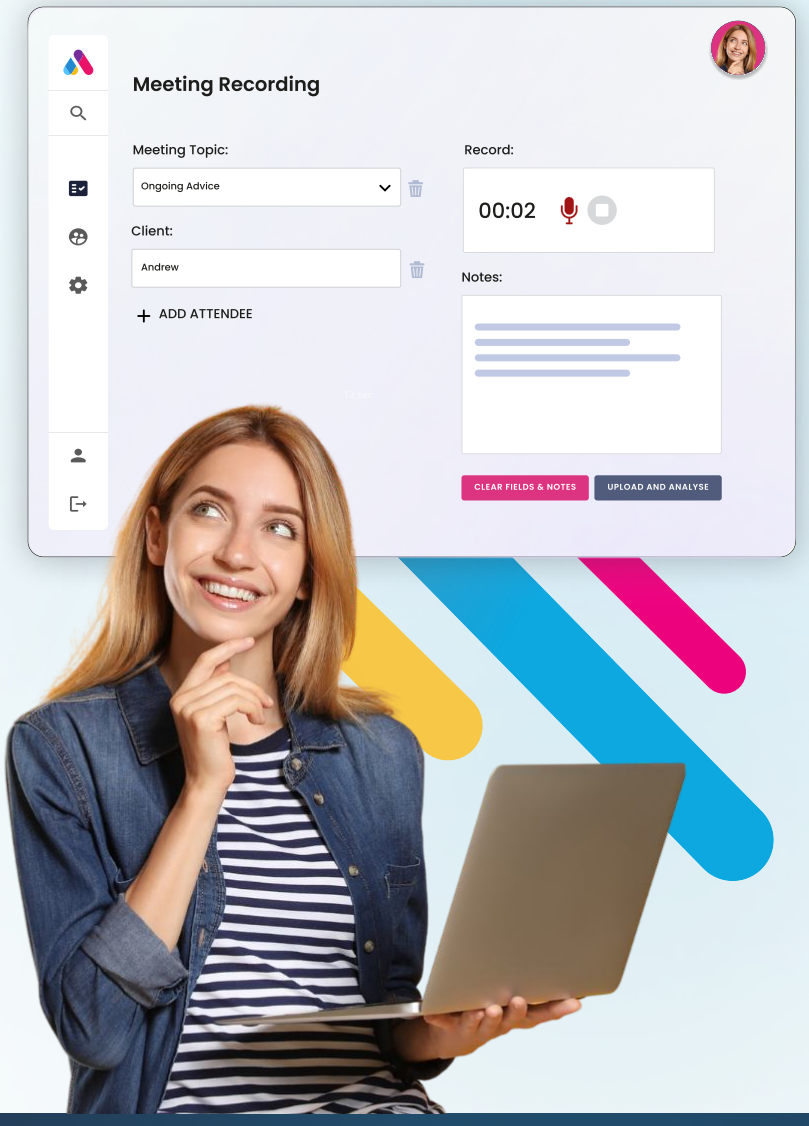


State-of-the-art AI built specifically for FS

Unlike other generic GenAI solutions, Aveni Assist has been built specifically for Financial Advisers. Our platform has been trained on FS-specific data and purpose built to accelerate adviser workflows.

Be better prepared

Have Aveni Assist auto-generate a post-meeting briefing note, collating all relevant information from multiple sources so you can be confident you have the critical information to hand when you need it.

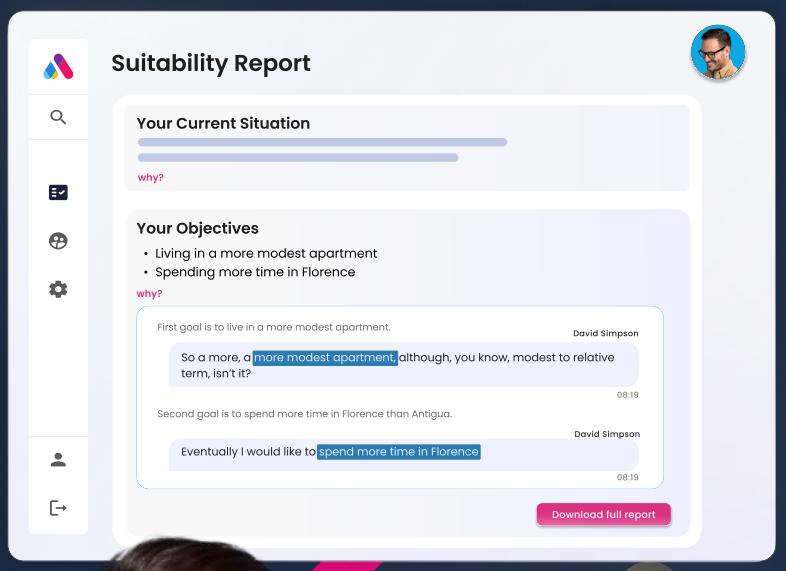


Improve client outcomes

Focus on each client's needs and aspirations, not on note-taking. Aveni Assist allows advisers to be fully engaged with their clients, working to achieve best possible outcomes.

Traceability

Understand where Aveni Assist information has come from with transparent and direct referencing back to the original call transcript.



Evidence for the regulator

Have a comprehensive, accurate account of calls available for recall and query to meet the regulator's data-first approach to supervision under Consumer Duty.

Quick and easy set-up

Our integrations with MS Teams, Webex and Zoom means quick and easy set-up, so your advisers can access powerful AI-assistance within an hour.

Our approach is **unique.**
Our scientists **are global leaders.**
Our **results speak for themselves.**



AI designed for UK financial services

Unlike many generic generative AI solutions available in CRM systems and other back office software, Aveni's platform has been designed specifically for the financial services industry. It is trained on sector-specific data and purpose built to accelerate the workflows of FS businesses.

World leaders in the field

Our team of scientists and engineers are regarded as world-leading NLP experts and are consistently ranked in the top 100 NLP Engineers globally. Our team has a wealth of experience in building secure, data driven solutions at scale bringing experience from leading firms such as McLaren, IBM and BAE Systems.

NLP expertise + extensive FS-industry experience

Aveni's management team has decades of experience working in Senior Management positions across financial services, including Asset and Wealth Management, Financial Advice & Platforms. We understand the challenges inherent in these businesses and target our solutions to solve them.

Human+ approach

We understand the value of human relationships in the Wealth and Advice worlds, and our objective is to protect that. The real power of utilising AI is enabling people to perform better, for their clients and their employer. That means automating low value tasks and augmenting high value activity.

Security as a priority

Data security is at the heart of our business operation. We're trusted with the data of some of the largest firms in the UK. Our ISO27001 certification and completion of the RiskLedger Information Security questionnaire further reinforces our dedication to upholding uncompromising data security practices.

Trusted

We're trusted by leading organisations across the financial services industry, helping them realise significant efficiencies through our core products Aveni Detect and Aveni Assist. Taken off the shelf or configured for specific business requirements, our primary objective is to exceed our clients' expectations, always.

Get in touch to learn how

Aveni Assist can cut adviser admin from hours to minutes.

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