

# Pioneering AI & Automation in advice

Dynamic Planner's AI-assisted processes are designed to unlock vast capacity in your business.

Our AI features have been developed to enhance efficiency, streamline processes, and empower advisers, paraplanners and compliance teams – all while keeping the human connection central to financial planning.

Our focus as always is on the client, data and the efficient flow of information.

- ▶ Ensuring the right client outcome, in line with your firm's proposition.
- ▶ Providing rich, accurate data to ensure AI tools have the right context.
- ▶ Creating a flow of information through our API and AI ecosystem.

## Enhancing the advice process with AI

Dynamic Planner supports the entire advice journey - from gathering fact find information to creating beautiful reports - with governance and oversight built in. Dynamic Planner's AI features will amplify the automation and time-saving processes you use today.

### Our features include:

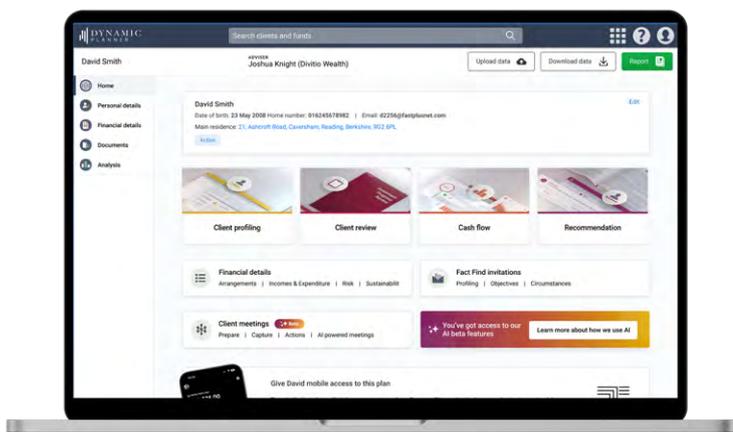
- ▶ **AI Live Transcription**  
Transcribe your meetings live in Dynamic Planner, or integrate with services like Zoom to automatically import your transcripts.
- ▶ **AI Meeting Summaries**  
Extract insights from any meeting transcript, producing structured meeting summaries to share with your clients and keep as a record.
- ▶ **AI Smart Meetings (coming soon)**  
AI analyses your meeting summaries to extract key data, updating the client's record with up-to-date fact find information.
- ▶ **AI Report Companion (coming soon)**  
Streamline the review process with in-built report compliance checking based on your firm's own policies.

### Keeping advice human in the age of AI

We firmly believe AI exists not to replace the roles of advisers and paraplanners, but as an accelerator. Human expertise remains at the heart of the financial advice process, with AI enabling automated process steps, reduced admin and time savings, allowing advisers to focus on the vital human aspects of advice.



We are proud to be first UK FinTech to achieve ISO/IEC 42001, proving our commitment to responsible, ethical, secure and compliant AI.



**Learn more**  
Scan the QR code to find out more





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