



Jasmine Granger
Chartered Financial Planner



Cameron Boon
Independent Financial Adviser

For nearly 50 years, Beechwood Financial Services has been more than a financial advice firm, it's been a trusted partner through life's biggest moments.

A firm that runs on relationships

Providing everything from retirement planning to supporting the next generation as they start saving, it's the kind of firm where relationships come first.

"We consider ourselves a community financial planner," says Jasmine Granger. "We have clients from all walks of life. We really try to help as many people as possible navigate their financial journey."

The hidden cost of every client meeting

For any advice firm, the quality of what happens between client conversations matters as much as the conversations themselves. But for Beechwood, and many others in the industry, the weight of post-meeting administration had become a drain on capacity.

"Following a client meeting, it can take anywhere from an hour to an hour and a half just to type up notes," says Cameron Boon. "It's time that could be better spent elsewhere."

Across the team, people had found their own ways to manage the administrative burden. Some relied on a dictaphone and typing services where others brought a paraplanner into meetings specifically to take notes. Either way, the delay was real. Notes could take until the next morning to come through, slowing the paraplanning workflow and leaving clients waiting. For a firm who value their client relationships, something had to change.

Client

Beechwood Financial Services

Industry

Financial Services

Firm size

1-20

Broaching the AI conversation

When the wider conversation about AI began to gather pace across financial services, Beechwood paid attention.

"At first, people were really dubious of it," Jasmine reflects. "But having delved a bit deeper into AI over the last six months, I've come to see how it helps with efficiency."

Cameron had a similar view. For him, adoption wasn't a question of if but when. "My initial thought was that everyone's going to have to adopt it at some point. The efficiency of AI is something that you either embrace or risk being left behind."

Of course, with new processes come new concerns: how does a firm adopt AI while maintaining their dedication to strict data privacy. With open AI tools like ChatGPT entering the mainstream, the idea of client information flowing into external systems was a non-starter. It was this that made Dynamic Planner's approach particularly compelling; AI built within a trusted, regulated platform they already used every day.

"What was potentially up to an hour, sometimes more, is now a ten, twenty-minute process. It also means for the advisers who were dictaphoning and getting someone to type it, you don't have that delay."

Cutting admin time in half

Once Beechwood began using Dynamic Planner's AI meeting summarisation, the impact was immediate.

What had previously taken up to ninety minutes of an adviser's time, replaying a dictaphone, typing up notes and potentially impacting a paraplanner's workflow, was now a process that took around twenty minutes, including review and editing. The summary was generated within minutes of the meeting concluding, through integrations with Zoom and now Microsoft Teams, and is complete with client objectives, agreed actions, and key discussion points.

With notes now available almost immediately, the workflow was accelerated, allowing the team to respond to clients faster.

Since rolling out the feature, the AI meeting summary service has been used across the business for every client call. There were some initial reservations about whether clients would be comfortable with having such personal conversations recorded, but in a world where virtual meetings have become the norm, clients were more than happy to agree.

More time for what matters

Time saved in one area is only valuable if it's put to good use. At Beechwood, there was never any doubt about where it would go: back to clients.

For Jasmine, who joined the firm a year ago, the extra capacity has led to more meaningful interactions. "I've got more capacity to have more touch points with my clients, to understand my client bank more, to get to know my clients more," she says.

And for Cameron, the time has flowed into the quality of the work going out to clients. "It's more time to work on reports and make sure the outputs going to clients meet our standards, rather than more internal note taking," he explains.

In a firm built on community and continuity, that shift from administrative overhead to meaningful client time is exactly the kind of change that compounds over years, not just quarters.

For Beechwood, who have been in operation since 1978, the move toward AI adoption is one they are undertaking secure in the knowledge that financial planning is a deeply human service. Embracing AI isn't about replacing what makes them effective, it's about protecting it.

"People like financial planners because there's that emotive element, there's someone to speak to. I don't think a robot will ever replace that. But with efficiencies within the workplace, it can be super, super useful."



We look forward to speaking with you

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