

FINITY360AI



Finity360 AI™: Revolutionizing the Wealth Management Middle Office with Integrated AI

In today's fast-paced business environment, the pursuit of efficiency has never been more crucial. Arcus Partners™ proudly introduces Finity360 AI™, a groundbreaking solution that reshapes the middle office landscape by simplifying complex business processes through the integration of Artificial Intelligence (AI).

- *Boost Productivity: Automate time-consuming middle office tasks, allowing teams to focus on high-value activities driving business growth.*
- *Reduce Training: Minimize training efforts by using natural language, simplifying business processes for Advisors, Operations, and Compliance.*
- *Stay Compliant: Ensure compliance with industry regulations and data protection standards, offering peace of mind in an ever-evolving regulatory landscape.*
- *Future-Ready: Arcus Partners is committed to continuous innovation. Finity360 AI™ evolves with businesses, adapting to emerging technologies and industry trends.*

Key Benefits

- ▶ **Seamless Integration:** Finity360 AI™ seamlessly integrates with the Finity360™ suite (native Salesforce) of middle office applications that include your documents, data, and workflows, effortlessly transforming the middle office into a more intelligent and efficient space.
- ▶ **Client Communication Analysis:** Use Finity360 AI™ to analyze emails, notes, and messages related to client communication. Extract key information such as client preferences, financial goals, or specific investment requests.
- ▶ **Document Classification:** Integrate Finity360 AI™ to classify and categorize documents within Salesforce based on their content. Automatically tag documents with relevant labels, such as "Financial Reports," "Investment Plans," or "Client Correspondence."
- ▶ **Intelligent Search:** Enhance Salesforce's navigation capabilities using Finity360 AI™ language model to provide Advisors intelligent and context-aware search results including launching workflows for home office requests and account opening.
- ▶ **Automated Report Summaries:** Leverage Finity360 AI™ to generate summaries of lengthy financial reports or documents. Attach these summaries to the original documents, providing a quick overview for wealth managers and clients.
- ▶ **Contextual Insights:** Use Finity360 AI™ to analyze the context of client interactions and transactions. Generate insights on potential investment opportunities, risks, or changes in client sentiment.
- ▶ **Compliance Monitoring:** Employ Finity360 AI™ to assist in monitoring client communications for compliance purposes. Identify and flag any language that may require further review or documentation.
- ▶ **Regulatory and Audit Requests:** Use Finity360 AI™ to find documents or information based on natural language queries for #regulatory requests or audits.
- ▶ **Customizable Prompts:** Finity360 AI™ comes with industry standard prompts built in with the flexibility for custom prompts, Finity360 AI™ optimizes efficiency to meet specific organizational needs.
- ▶ **Customizable Training Data:** Highlight the module's flexibility in being trained on custom datasets, allowing users to tailor it to specific domains or industries.

About Finity360™

Finity360™, an innovation of Arcus Inc., is a suite of cloud-based document and data management solutions that gives financial institutions the agility, scale and security they need to gain maximum business value from their traditional documents, digital assets, and operational workflows.

Based on more than 30 years of experience in capital markets, securities back-office operations, data aggregation and system integration, Finity360™ helps capital markets and other financial services organizations modernize their operations and revenue models by eliminating technology, process, data and regulatory challenges.

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