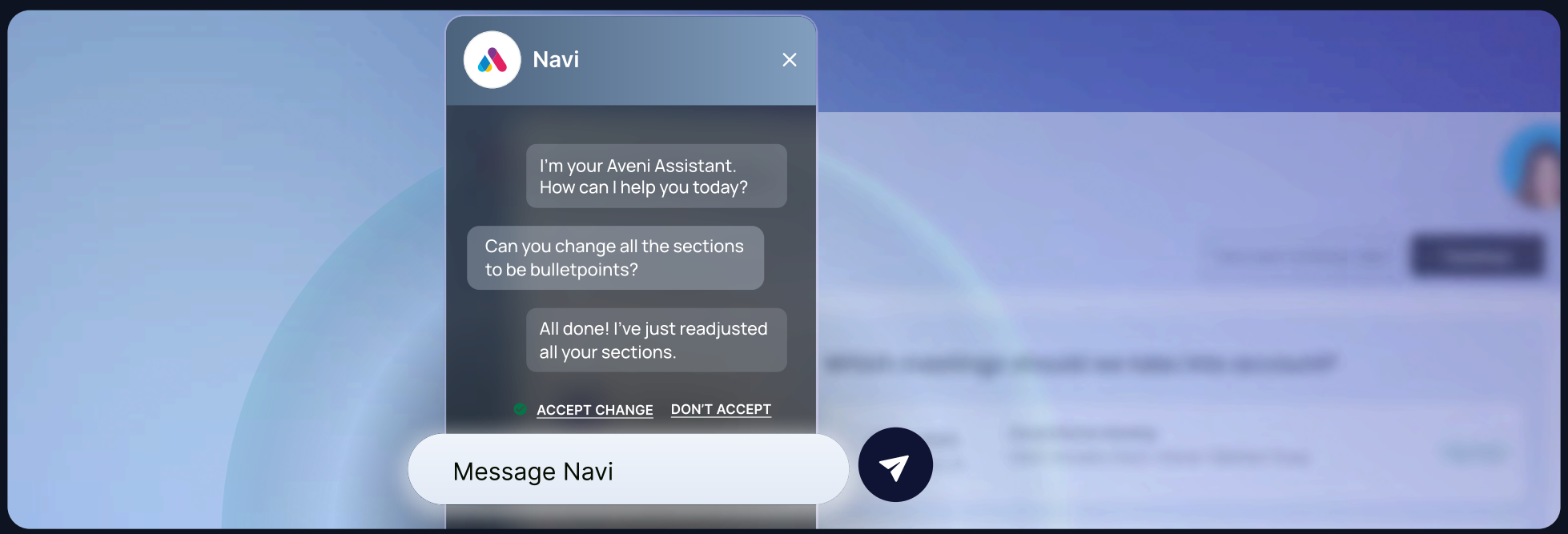
aveni assist

Navi - Your CoPilot for clearer client conversations

Navi is your intelligent adviser CoPilot built into Aveni Assist. It helps advisers quickly refine meeting summaries and follow up actions so they're clearer, more personal and aligned with firm standards.

Working directly from the meeting transcript, Navi allows users to ask questions, reshape wording and adjust detail using simple, natural language. Every suggested change is clearly shown before it's applied, keeping you firmly in control of the final output.

The result is faster editing, better summaries and a workflow that stays entirely within Aveni Assist.



Why meeting summaries still feel harder than they should

Advisers spend too much time rewriting meeting summaries to match firm style, compliance guidance or personal preference.

Until now, this has been difficult because:

- Summary structure is fixed at firm level, limiting flexibility
- If an AI summary missed key detail or used an unwanted format, every section had to be manually edited
- Many advisers export content into other generic AI generative AI platforms to get the right tone or level of detail

This creates friction, risk and inefficiency.

Navi removes these pain points by bringing a familiar chat based refinement workflow directly into Aveni Assist, allowing advisers to adjust summaries quickly, safely and confidently.

Designed for advisers who value clarity and control

Navi is designed for advice professionals who produce client documentation within Aveni Assist, including:



Financial advisers who want to save time and improve the clarity of their summaries



Paraplanners responsible for accurate, compliant records



Investment managers who tailor tone and detail to different portfolios



Firms with bespoke output needs, especially those migrating in phases

Navi is ideal **for users who value precision and personalisation, but want to avoid the burden of manual rewriting or exporting content** into external tools.

Navi Benefits at a Glance

1

More personal, more natural documentation

Navi helps summaries sound like the adviser who wrote them, refining tone, structure, and detail in seconds to reduce frustration and improve satisfaction.

2

Faster refinement inside the existing workflow

There is no need to leave Aveni Assist. Navi provides a simple chat interface that allows advisers to refine content exactly where they already work.

3

Stronger confidence through transcript based answers

Every response is grounded in the meeting transcript, with clear evidence links. This supports accuracy, trust and audit readiness.

4

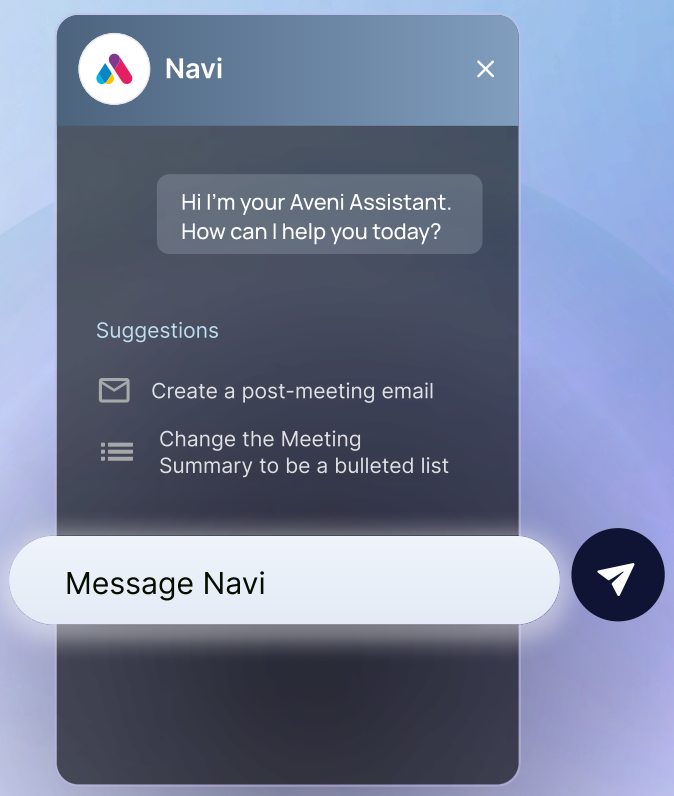
Better governance without losing flexibility

Firm level structure remains intact, while advisers gain flexibility within those boundaries. Every proposed change is visible and must be approved by the user.

5

Easier adoption across firms with varied styles

By accommodating different communication styles and levels of detail, Navi makes Aveni Assist more adaptable across large and mixed user populations.



aveni

Proposed changes, not silent edits

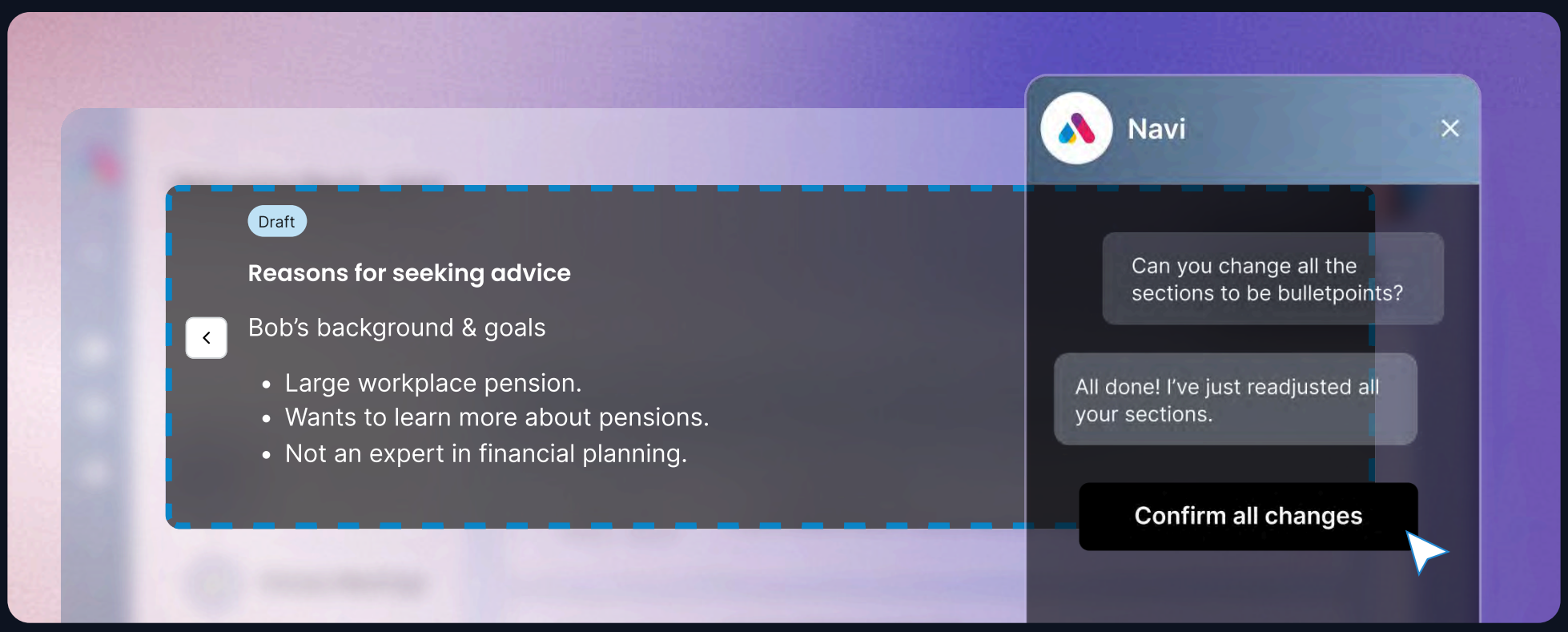
When a user requests an edit:

Navi creates a proposed version

The original and proposed content are shown side by side

The user chooses whether to accept or ignore the change

Accepted proposals update the summary, and users can still make manual edits afterwards.



What Navi can edit

Meeting Summary content within existing sections

Post meeting email content within the chat

The overall structure of the summary remains governed by firm level admin tools to maintain compliance and consistency.

Spend less time rewriting. Spend more time advising

aveni | hello@aveni.ai | aveni.ai