

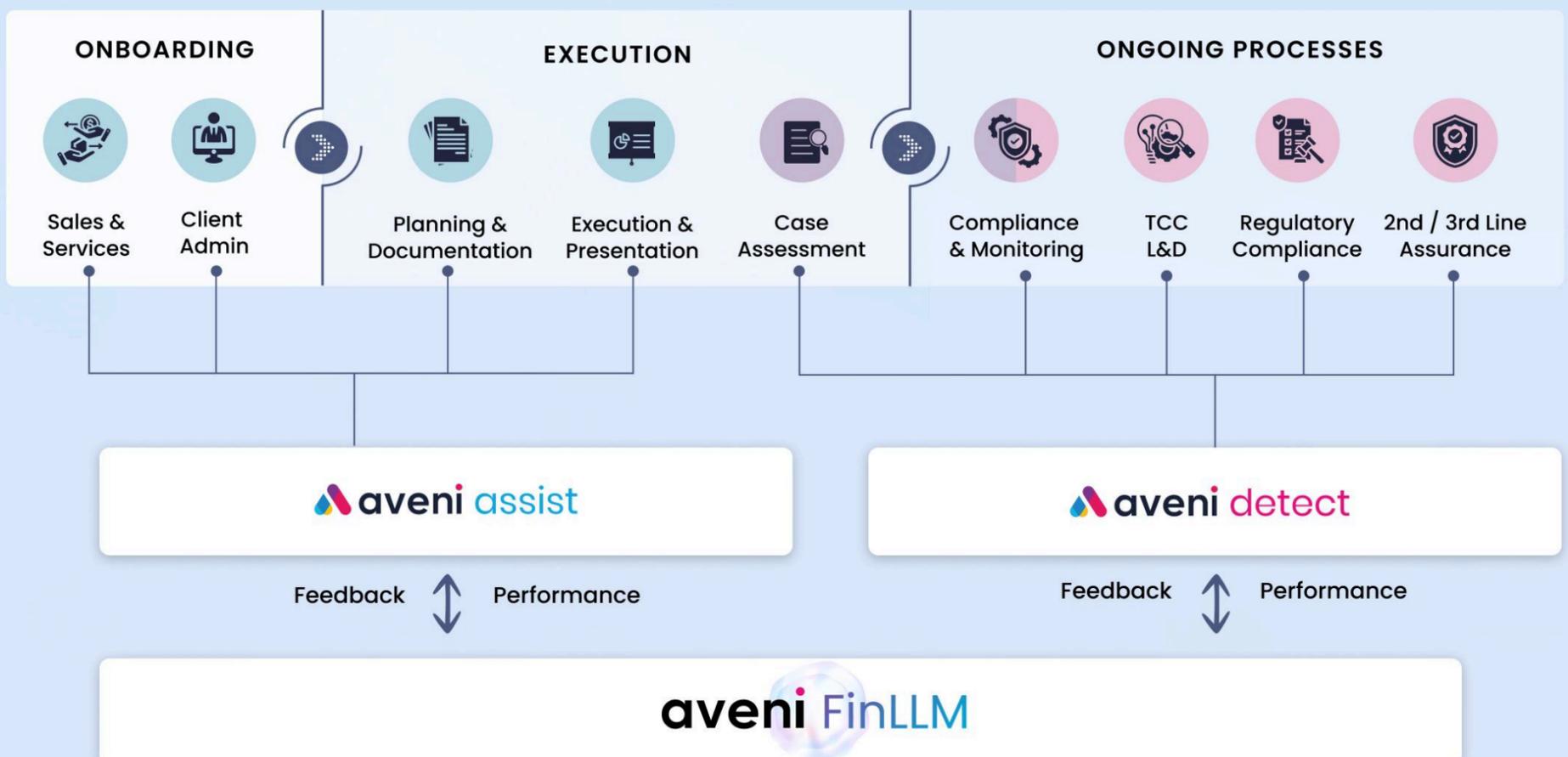
Spearheading the FS productivity revolution with advanced AI

Empowering your teams with intelligent solutions that drive efficiency, compliance and innovation.



Advanced AI solutions to drive productivity across multiple financial services workflows

Aveni wraps advanced AI tools around your teams to transform the operational landscape of financial services. Our cutting-edge AI platform streamlines key workflows—including administration, report generation, risk assurance, compliance, and assessments of calls and documents—resulting in significantly improved productivity and valuable insights. By automating repetitive tasks, we empower financial professionals to focus on what truly matters: delivering exceptional service and driving strategic growth.



Cut admin from hours to minutes with an AI-assistant built specifically for financial advice

Aveni Assist powers productivity for financial advisers by enabling them to get hours of admin done in just a few minutes. Our AI assistant delivers unprecedented support, joining client calls to automate report generation, CRM admin, post-meeting briefings, and follow-up emails while ensuring compliance.

With Aveni Assist at your side, your organisation can accelerate adviser efficiency, focus on high value activities, and rest easy knowing AI outputs are reliable, accurate, and compliant.



Save 75%
of time per on-going advice meeting

Post-Meeting Email
Aveni has drafted a post-meeting email for you to send to the client
EDIT

Current financial position

Income
The client earns a total of £30,200 per year, which comes from a monthly income of £2,516.

Tim Chong
I get paid at the end of every month with a salary of £2,516.
6 sec



Instant CRM administration

Administer your CRM with key facts from a call within minutes of your client meeting finishing.



Auto-generated suitability report information

Generate relevant information from across a lengthy advice call to create a comprehensive suitability report in your company's tone and style.



Post-meeting briefing note & email

Within minutes of completing a call, craft a detailed, personalised client email and briefing note confirming key information and agreed upon actions.



Integrated

Seamless integration with MS Teams, Webex, Zoom and Google Meet, means Aveni Assist is quick to set-up and get started with.



Traceability

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

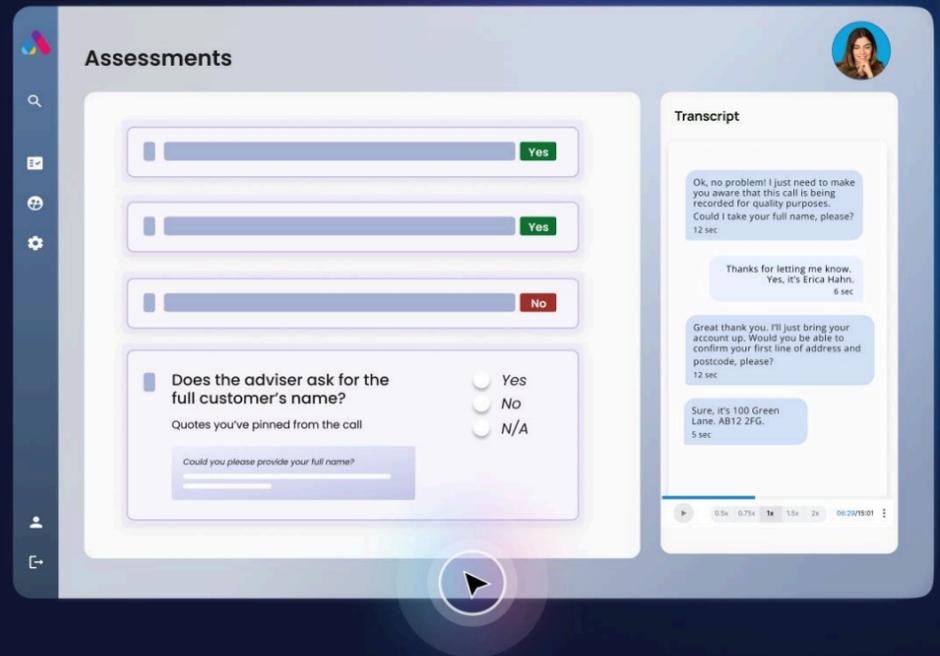


Support license options

This licence offers a cost effective solution for internal resource that support advisors, allowing colleagues to perform essential tasks while advisers retain control over key processes.

100% coverage at a fraction of the cost

Aveni Detect systematically monitors and analyses every call and document, acting as a Machine Line of Defence™ to identify and understand risks that matter to you. In addition to effective preventative control, and richer data analytics, we help you achieve greater productivity, adviser performance and revenue growth, making QA processes significantly faster and scaling oversight from 1% to 100%.



Automatic document check

Eliminate slow, manual document reviews and effortlessly manage complex case loads. Aveni Detect automates document checks analysing client datapoints across multiple sources.



Data-driven assurance with Auto QA

Achieve 100% coverage at a fraction of the cost by allowing Aveni Detect to automatically assess every call and document, significantly reducing the time to complete each human assessed case.



Identify any vulnerable customers across all calls

We've integrated FCA guidance into Aveni Detect, helping you identify vulnerability risks in all calls and understand vulnerable customers, their changing needs, and outcomes.



Manage Consumer Duty

Monitor interactions for vulnerability, poor experiences, complaints and dissatisfaction, identifying issues early, helping firms act quickly to support good outcomes, prevent harm and demonstrate clear accountability.



Insight from 100% of calls

Turn the customer voice into a new, rich source of data. Analysis from every call can power business decision making and automation.

FinLLM: The Future of Financial AI

Aveni's FinLLM is a Large Language Model (LLM) purpose-built for the financial services industry, offering AI that deeply understands financial language, regulatory frameworks, and compliance requirements. Unlike generic AI models, FinLLM is trained on financial data, ensuring its outputs are precise, ethical, and transparent.



7-70bn Parameter Models

Designed specifically for financial services use cases, ensuring optimal performance when addressing industry-specific challenges.



Full Model Transparency

Our approach prioritises interpretability, giving enterprises confidence in AI-driven decisions and compliance adherence.



Aveni Vault: Ethical Data Collection

We ensure that our training datasets are ethically sourced, reducing bias and improving reliability.



Aveni Bench: Rigorous Model Evaluation

Continuous testing and benchmarking validate the effectiveness and fairness of our AI models.



AI Safety & Ethics

Built-in safety measures and governance frameworks ensure our AI aligns with industry standards and regulatory expectations.



Active FCA Engagement

Collaborating with regulators to shape AI governance and compliance within financial services.

FinLLM is more than just an AI model, it's the foundation for a new agentic AI framework designed to enhance automation, decision-making, and security across financial institutions.

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



AI designed for financial services

Unlike generic generative AI tools found in CRM and back office systems, Aveni's platform is purpose-built for financial services. We are building the UK's first financial services large language model, trained on sector-specific data to accelerate workflows and deliver industry-grade performance.



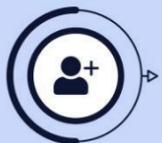
World leaders in the field

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.



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 lies in enabling people to perform better for their clients and 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 industry's largest players. 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 more



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