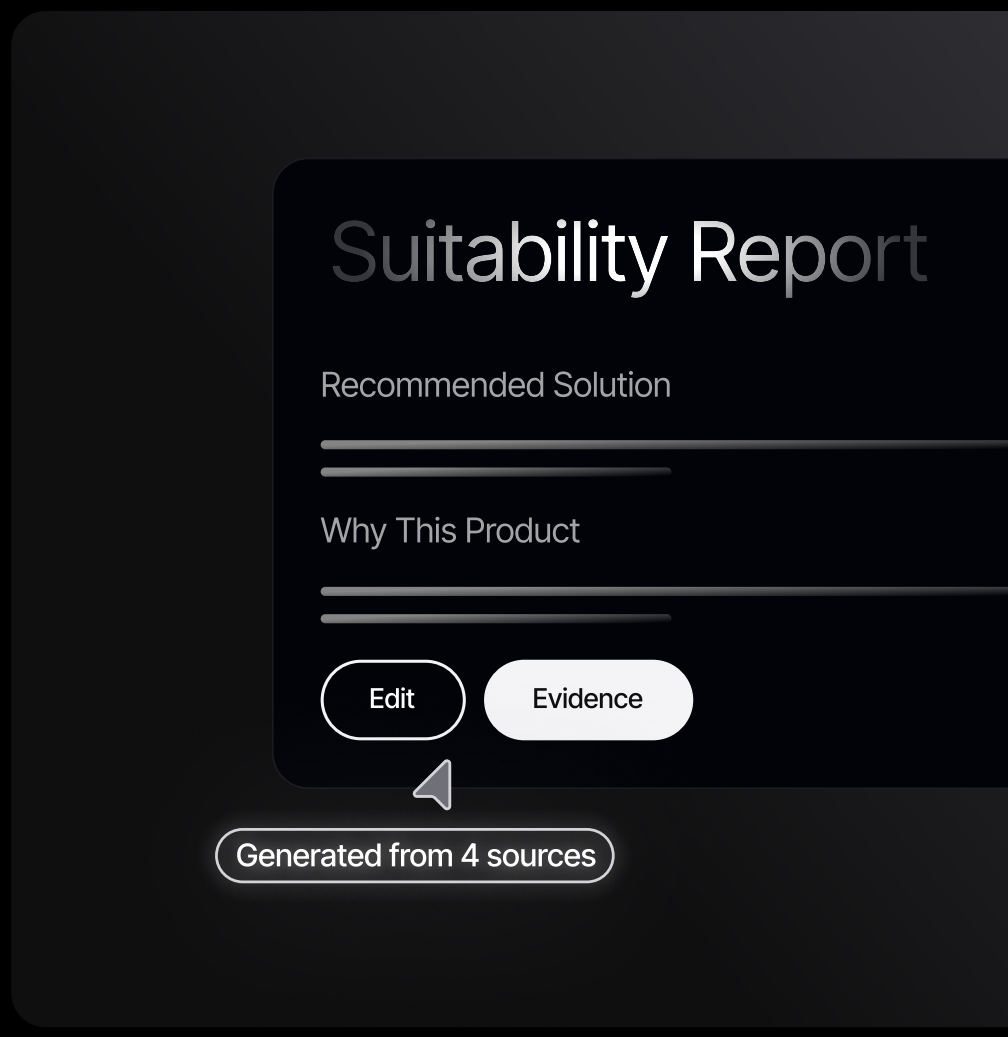
aveni assist

DOCUMENT GENERATION

Personalised, regulator-ready documents in minutes.



Suitability reports, annual reviews, provider and client letters, withdrawal and top-up letters, research file notes and compliance reports eat hours of manual work, piecing together meetings, fact finds and CRM data. **Document Generation transforms that.** Part of Assist, it produces polished, compliant documents from your own Word templates, in minutes rather than hours.

The outcomes advisers see

Time given back to clients, not paperwork

10min

Annual review (no-change) reports, down from 30–90 minutes

20min

Complex fund-switch reports, down from 90 minutes

Same day

Reports reach clients, versus the typical 4–6 weeks

aveni

HOW IT WORKS

One report, every source pulled together

1

Bring your template

Upload your existing Word format. No rebuilds or vendor set-up, so your brand and tone stay intact.

2

Connect the data

Assist draws on your firm's report templates, meeting summaries and CRM data, plus supporting documents like illustrations, fee information, cashflow forecasts, risk questionnaires and product literature.

3

Review & refine

Gaps are flagged for you to fill before completion. Every line is editable, traceable to its source and human-approved.

4

Deliver same day

Export a polished, client-ready document straight back into your workflow, with turnaround in hours rather than weeks.

WHY IT'S DIFFERENT

Works natively with Word

No template rebuilds, no reformatting, no costly setup. Your in-house Word format stays on-brand and compliant from day one.

True personalisation

Tailored to each client's circumstances using the full advice context, not a one-size-fits-all, single-meeting summary.

Clarification built in

Missing detail is flagged and the adviser is prompted to complete it before sign-off, reducing compliance risk.

Safe, explainable, auditable

Human-in-the-loop by design. Every output is reviewable, revisable and backed by clear source traceability.

Financial adviser

> I've been so impressed. One of the letters I generated was a withdrawal letter, and it probably took about five minutes. The quality of the output was extremely high, just from pulling through a small amount of information.

WHO IT'S FOR

Financial Advisers

Turn meetings into suitability reports and client letters in minutes, freeing time for advice.

Paraplanners

Cut repetitive drafting and reformatting, and focus on analysis and report quality.

Compliance & Ops

Consistent, auditable, FCA-aligned output across every adviser, with role-based controls.

See Document Generation in action

Book a demo and we'll show you how it works against your own templates and data.