

Your advisers.

More time.

Better

outcomes.

# Your advisers. More time. Better outcomes.

Aveni Assist sits alongside your advisers in every client meeting — capturing what matters, automating the admin that follows, and keeping intelliflo up to date. Built specifically for financial services, so it works the way your firm does.

## 334k+

meetings processed on Assist

## 75%

of time saved per ongoing advice meeting

## £4.6M

adviser productivity reclaimed across our customer base

### ✘ Where advisers lose time today

- Hours spent writing meeting notes, CRM updates, and client emails after every meeting
- Generic AI tools don't understand FCA Consumer Duty or FS regulatory language
- Manual fact find data entry into intelliflo office is slow and error-prone

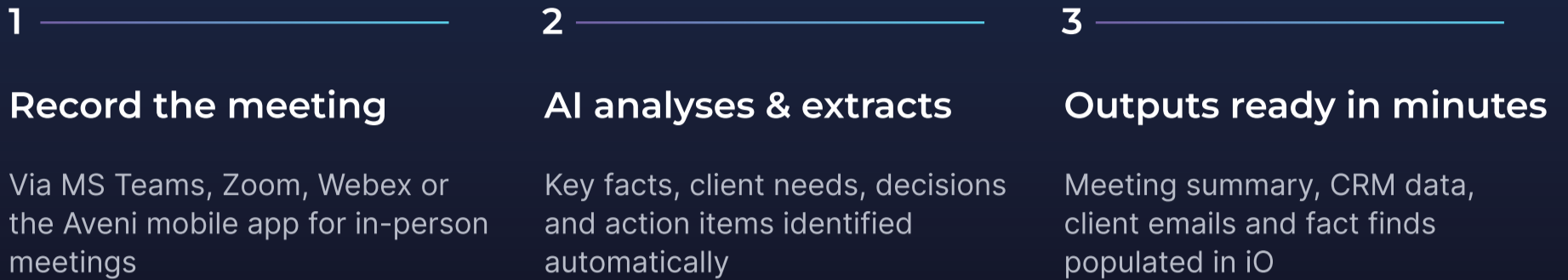
### ✔ How Aveni Assist transforms the workflow

- + Attends your meetings and auto-generates compliant outputs within minutes
- + Trained on FS-specific data — understands FCA standards, Consumer Duty and suitability frameworks
- + Deep intelliflo integration: both hard and soft facts and actions straight into intelliflo office automatically

Tailored post-meeting email for Jon Doe, written in our company's style and format.



# From meeting to completed admin, in minutes



## What Aveni Assist delivers

Everything your advisers need, built directly into intelliflo. Every capability is traceable back to the original transcript — giving advisers, paraplanners and compliance teams full confidence in every output.



### Flexible Recording

Record from MS Teams, Zoom, Webex or the Aveni Meeting App for in-person. Manually upload calls for complete coverage

- Teams
- Zoom
- Webex
- Mobile App



NEW

### Customisable Meeting Templates

Firms can self-serve their own meeting summary templates — adding, reordering and configuring sections by meeting type, team or individual adviser.

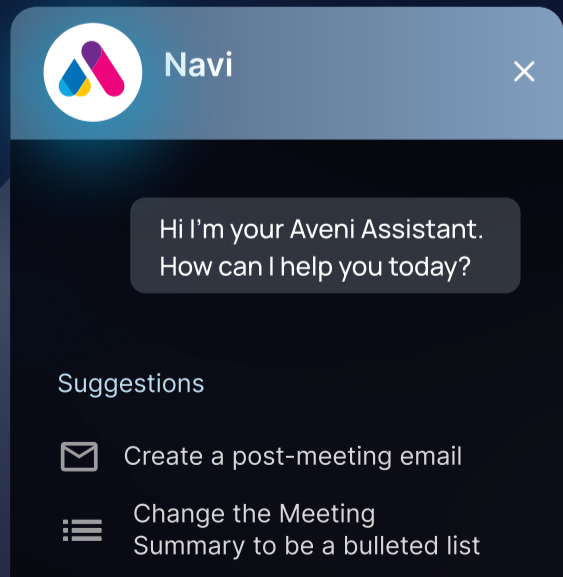
- Per meeting type
- Team & individual level



### Meeting Summary & Actions

Comprehensive, structured meeting summary ready within minutes — push directly to intelliflo office, share with your paraplanner directly within Assist, or download and share outside of Assist / intelliflo office

- Auto-generated
- Push to iO





NEW

## Navi – Your Summary Co-pilot

A chat-based refinement tool built into the meeting summary screen. Ask Navi to rephrase sections, adjust tone, draft a client email, or answer questions about the meeting.

Transcript-grounded

Adviser-approved edits



## CRM Auto-population

Key client data, decisions and actions extracted from the meeting and pushed straight into intelliflo office — keeping your CRM accurate and up to date without manual re-entry.

Direct iO sync



NEW

## intelliflo Fact Find Integration

Client facts captured in meeting are pushed directly into the intelliflo Fact Find — saving time, reducing errors and keeping iO up to date automatically.

Direct iO sync



## Client Communications

Tailored post-meeting client emails drafted automatically. Advisers review and send — never write from scratch again.

Adviser led



NEW

## Aveni Protect — Self-coaching & Early Assurance

AI-powered insights after every key client meeting — automatically surfacing vulnerability signals, suitability gaps and Consumer Duty risks so advisers can self-correct before formal QA.

Consumer Duty

Adviser-first



## Paraplanner Access

Cost-effective paraplanner licence lets support staff access Assist outputs while advisers retain control over key processes and approvals.

Role-based access

Team workflow



# Why leading advice firms choose Aveni

Designed for financial advice, from the ground up

Generic AI tools weren't built for regulated advice. Achieving production-grade performance in this environment takes years of domain knowledge, compliance expertise and in-market refinement — something Aveni has been building from day one.

## WHY AVENI?



### Purpose-built for UK financial services

Built specifically for UK wealth and advice firms — not a generic AI tool retrofitted for compliance. Aveni understands FCA Consumer Duty, suitability frameworks and adviser workflows, trusted by firms including Schroders Personal Wealth, 7IM, Succession Wealth and Octopus Money.



### Full traceability

Every output references directly back to the original call transcript, giving advisers, paraplanners and compliance teams complete confidence in where information came from and how recommendations were formed.



### Native 2-way intelliflo integration

Seamlessly pushes and pulls fact find data, meeting summaries and actions directly into intelliflo office — no manual re-entry, no switching between systems.



### Customisable and configurable at firm level

Create and manage your own meeting summary and suitability report templates — ensuring the AI works for your firm, your processes and your specific business needs.

"It is undoubtedly an asset to our business. Saving an average of 50 minutes per meeting across our financial planners – that's 1,400 hours saved per month."

## Roadmap Highlights – What's coming next

COMING SOON

### Letters of Authority Extraction & Analysis

Upload provider documentation and automatically extract, assess and structure plan data against configurable checklists for your firm — highlighting gaps and auto generating chaser communications.

Auto-extraction

Gap identification

i0 push

COMING SOON

### Pre-Execution File Checks

Automatically review advice files before submission or execution. Firms create and manage their own scorecards aligned to internal standards and FCA expectations, with clear pass/fail outcomes and remedial actions surfaced to advisers and paraplanners.

Custom scorecards

Pre-execution

Audit trail

# Get started today

Get started with Aveni Assist for  
intelliflo today, or speak to our team  
to see it in action for your firm.

