

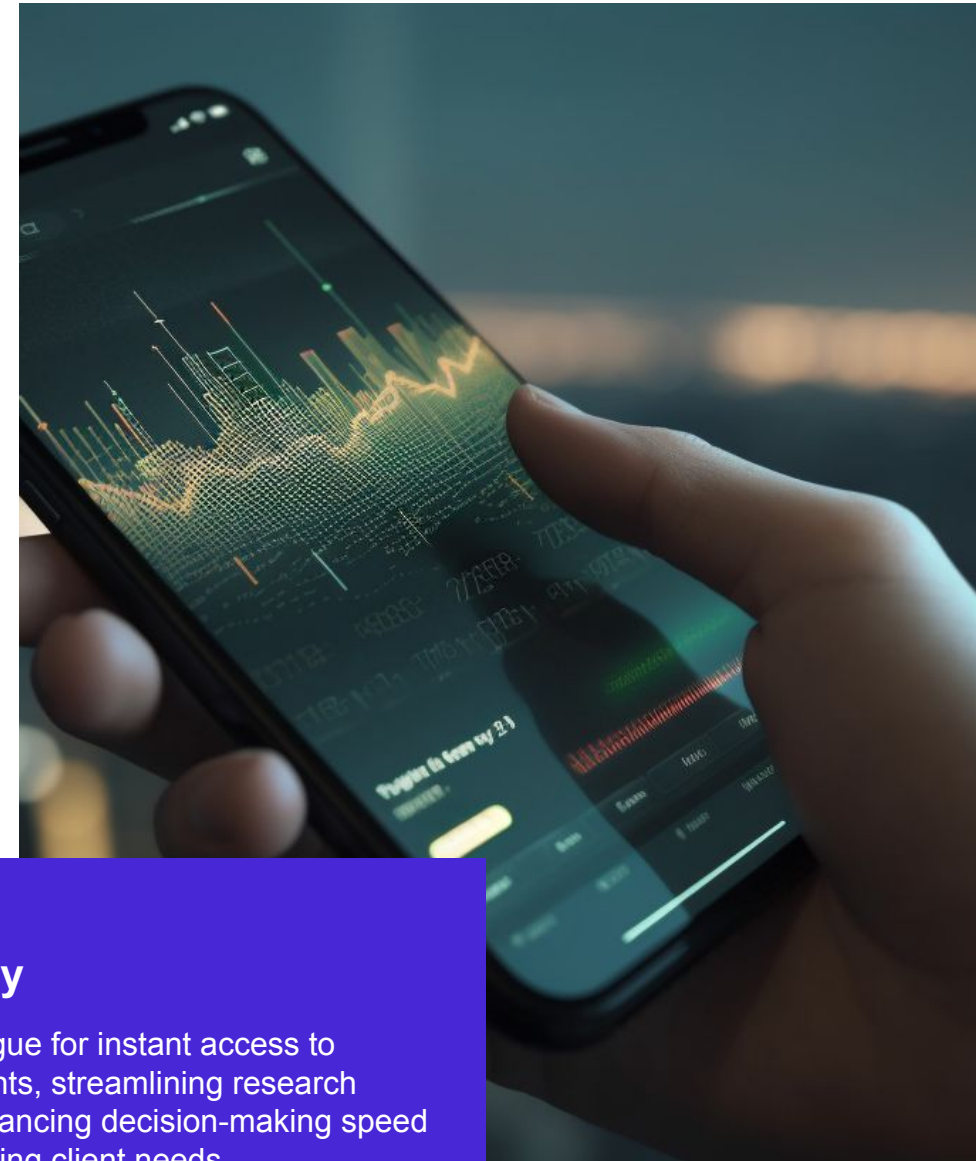
Accelerating Wealth Management with Next-Generation AI

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CEO of Asset Velocity AI



Accelerating Wealth Management Introduction



Client Engagement

01

Implementing Intelligent AI Calling Agents to enhance client interaction, providing 24/7 support, reducing missed communications, and improving overall client satisfaction and retention.

Data Efficiency

02

Utilizing Data Dialogue for instant access to essential data insights, streamlining research processes, and enhancing decision-making speed to better meet evolving client needs.

Market Overview and Industry Challenges

01 Asset Growth
High-net-worth investable assets projected to reach \$210 trillion by 2025.

02 Competitive Pressure
8.2% increase in the number of millionaires globally intensifies market competition.

03 Client Expectations
37% of client interactions occurring outside traditional business hours create service gaps.

04

Response Gaps

43% of client inquiries after hours remain unanswered, affecting loyalty.

05

Compliance Costs

Manual processes lead to 15% annual increases in compliance spending for firms.

06

Financial Penalties

Firms incur average annual penalties of \$1.2 million due to compliance errors.

07

Urgent AI Need

Firms integrating AI solutions report significant improvements in client retention.

Client Expectations and After-Hours Service



Problem 1

Clients value 24/7 accessibility for critical inquiries and support.

37% of interactions occur after hours.

Many inquiries remain unanswered during these times.



Problem 2

Evolving expectations lead to higher demand for personalized experiences.

Clients expect tailored solutions at all times.

Pressure to deliver immediate responses is increasing.



Problem 3

Competitive edge relies on effective after-hours engagement strategies.

Firms without after-hours service risk losing clients.

Unattended inquiries can undermine client trust swiftly.

Regulatory Scrutiny and Compliance Costs

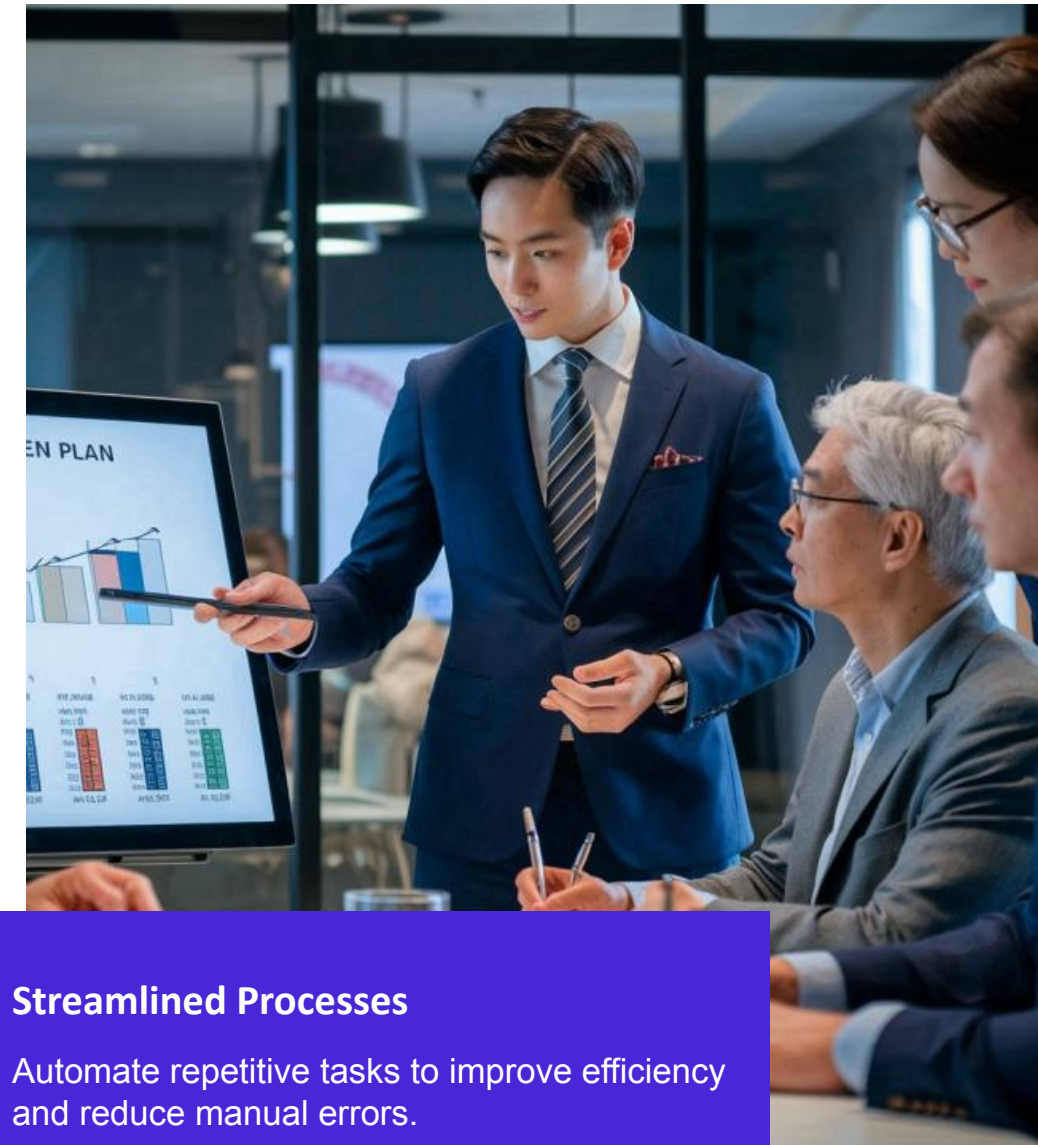
- 01 Cost Increase**

Compliance spending increases by approximately 15% annually across firms.
- 02 AI Integration**

Integrate AI tools to automate compliance checks and reduce costs.
- 03 Error Reduction**

Leveraging AI decreases compliance-related errors and financial penalties.
- 04 Monitoring Solutions**

Implement real-time monitoring systems to ensure ongoing compliance.



Streamlined Processes

05

Automate repetitive tasks to improve efficiency and reduce manual errors.

The Need for AI Integration



Problem 1

**Unanswered Client Inquiries
Affect Satisfaction**

43% of inquiries occur after
business hours

Missed opportunities lead to lost
client trust



Problem 2

**Increasing Competitive
Pressures Within Industry**

Projected rise of 8.2% in
millionaires globally

Firms risk losing market share
without AI



Problem 3

**Rising Compliance Costs and
Regulatory Risks**

Manual compliance processes
incur 15% cost increases

Average penalties of \$1.2 million
annually observed



Problem 4

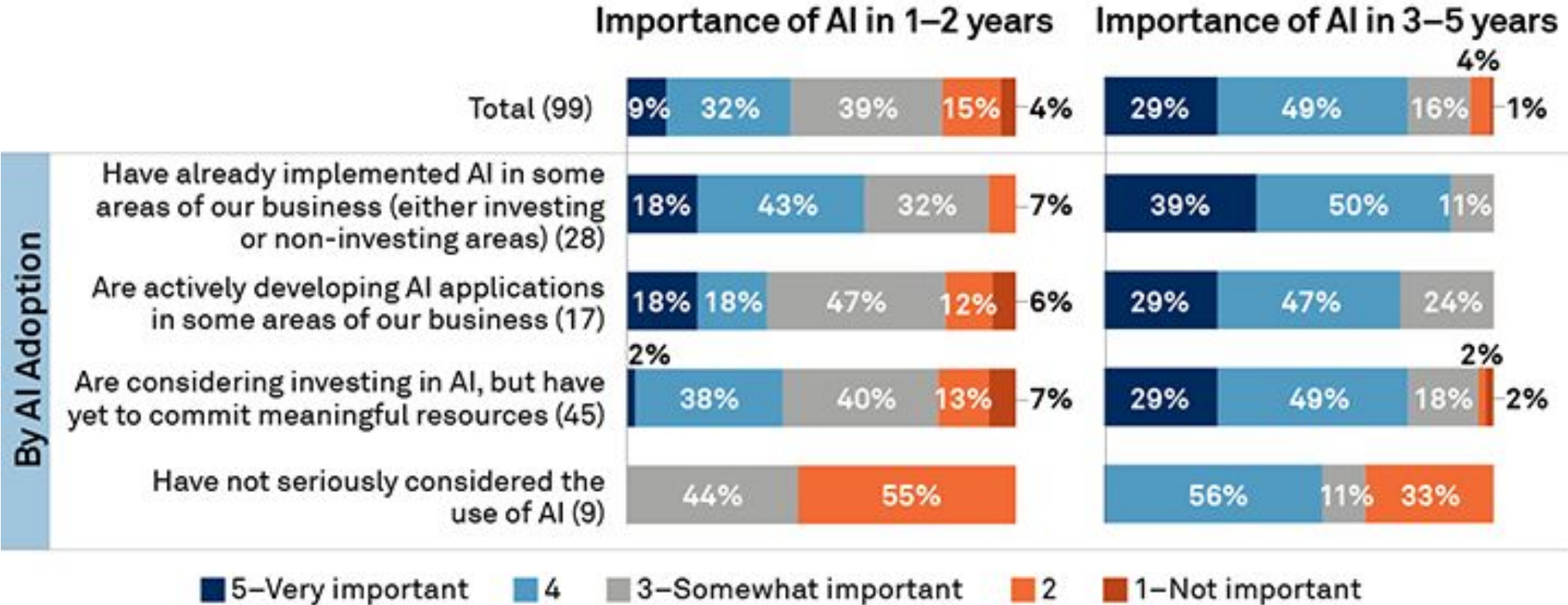
**Need for Real-Time
Personalized Client Service**

37% of interactions outside
traditional hours

Clients demand accessible
support 24/7

ROI and AI Adoption in Wealth Management

Importance of AI for Asset Managers



Note: Numbers in parentheses represent number of respondents. May not total 100% due to rounding.
Source: Coalition Greenwich 2023 Global Asset Manager AI Study

Asset Velocity AI: Innovative Approach

Intelligent Agents

01

24/7 proactive outreach to clients ensures timely engagement and reduces missed communication opportunities during non-business hours.

Client Retention

04

AI-driven engagement strategies lead to higher client retention rates, reducing churn and enhancing long-term client relationships.

Data Dialogue

02

Natural language querying simplifies data access, enabling wealth managers to quickly retrieve insights and support faster decision-making.

Knowledge Retrieval

03

AI systems consolidate compliance documents into a unified base, streamlining information access to mitigate compliance risks effectively.



Intelligent AI Calling Agents



Problem Faced

Client interactions are often missed after hours.



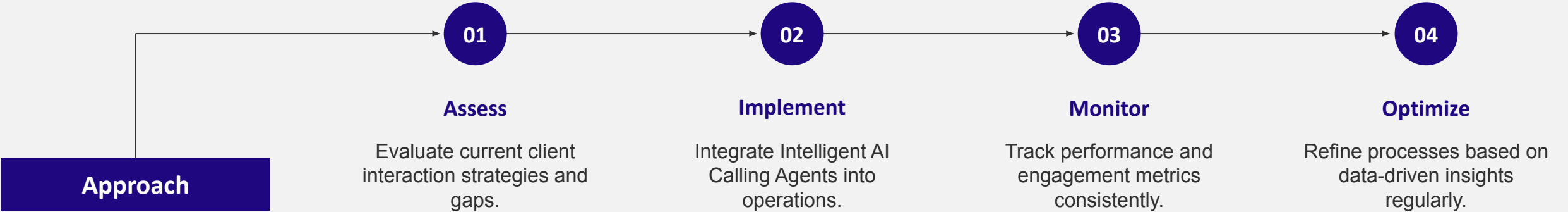
Solution Offered

24/7 monitoring with proactive outreach capabilities.



Benefits

Enhanced client engagement and retention rates.



03

Monitor

04

Optimize

Data Dialogue: Natural Language Querying



Problem Faced

Time-consuming data research affects decision-making speed.



Solution Offered

Natural language querying for rapid data access.

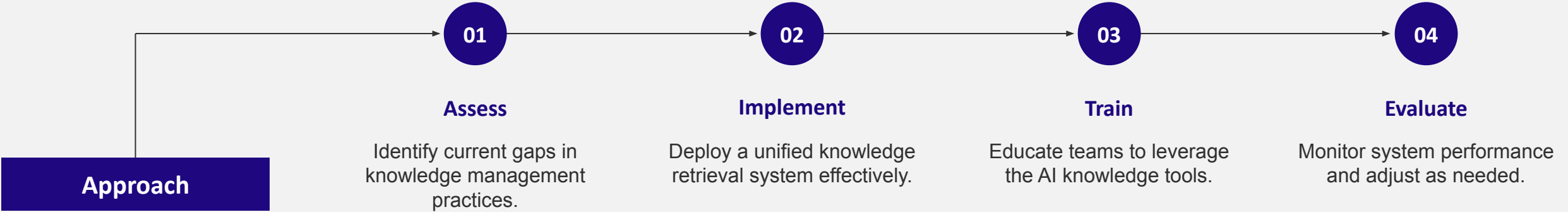
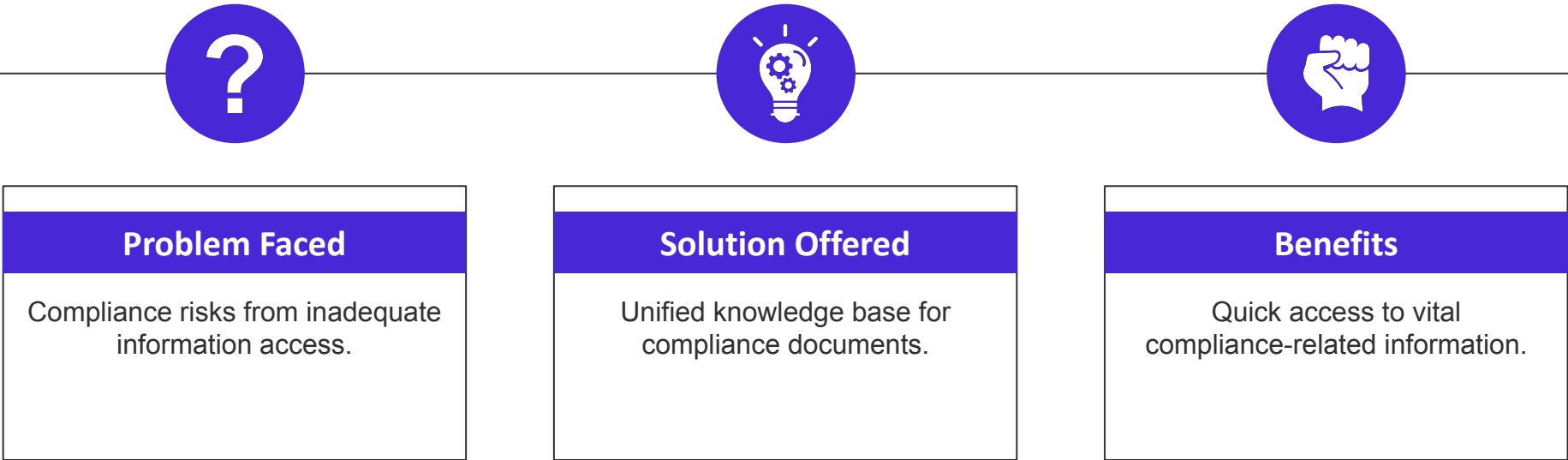


Benefits

Enhances decision-making speed and efficiency.



AI Knowledge Retrieval Solutions



Future Trends in Wealth Management

Growing demand for AI-driven ESG compliance tools will enhance transparency and accountability, allowing firms to automate reporting processes and attract socially-conscious investors while minimizing compliance risks and fostering client loyalty.



Generational Wealth transfer and Digital Services



Next-Gen Engagement

01

Implement AI-driven outreach strategies to facilitate communication with heirs during wealth transfers, ensuring engagement and minimizing misunderstandings while strengthening client relationships across generations.

Personalized Portfolios

02

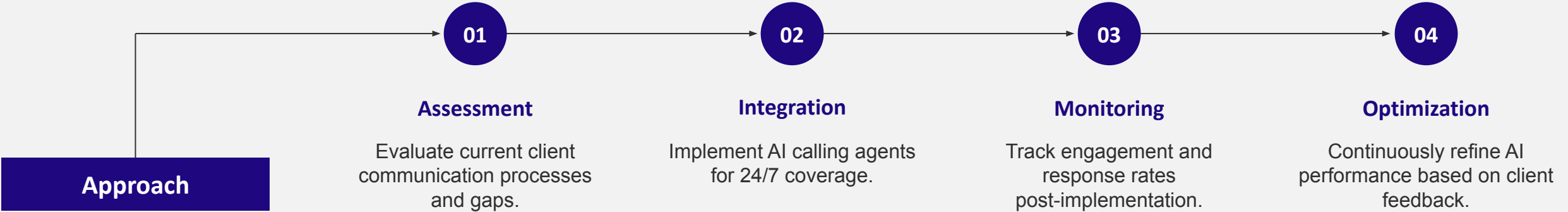
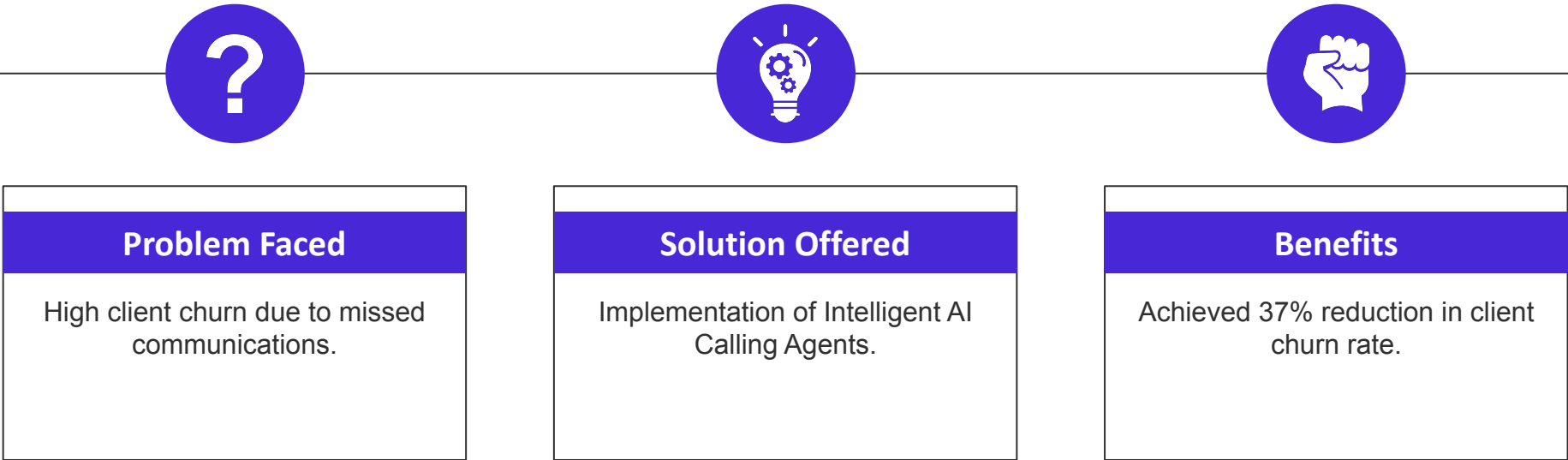
Utilize AI analytics to create tailored wealth management strategies for inherited portfolios, aligning investment approaches with the specific risk tolerance and financial goals of younger generations.

Digital Accessibility

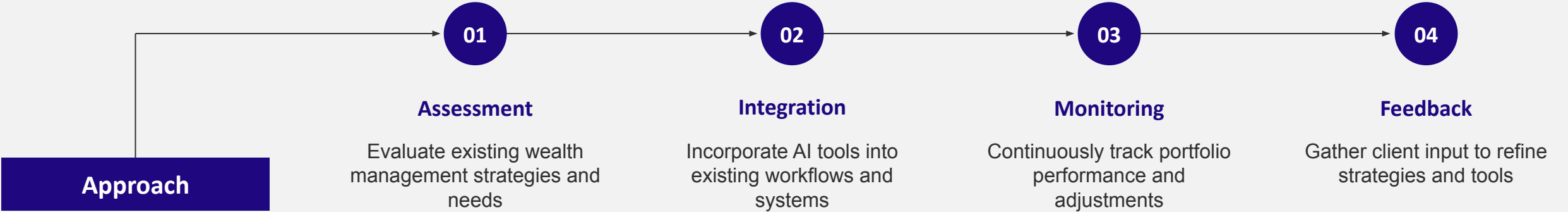
03

Enhance user experience with 24/7 digital platforms utilizing AI assistance to make wealth management services easily accessible, addressing the needs of tech-savvy heirs who prefer online interactions.

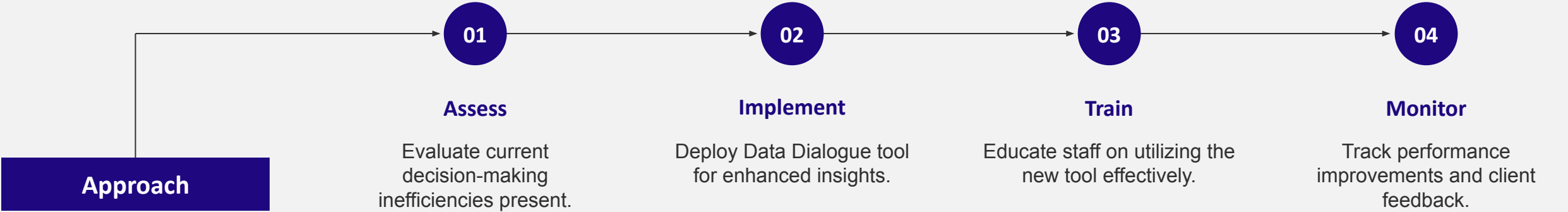
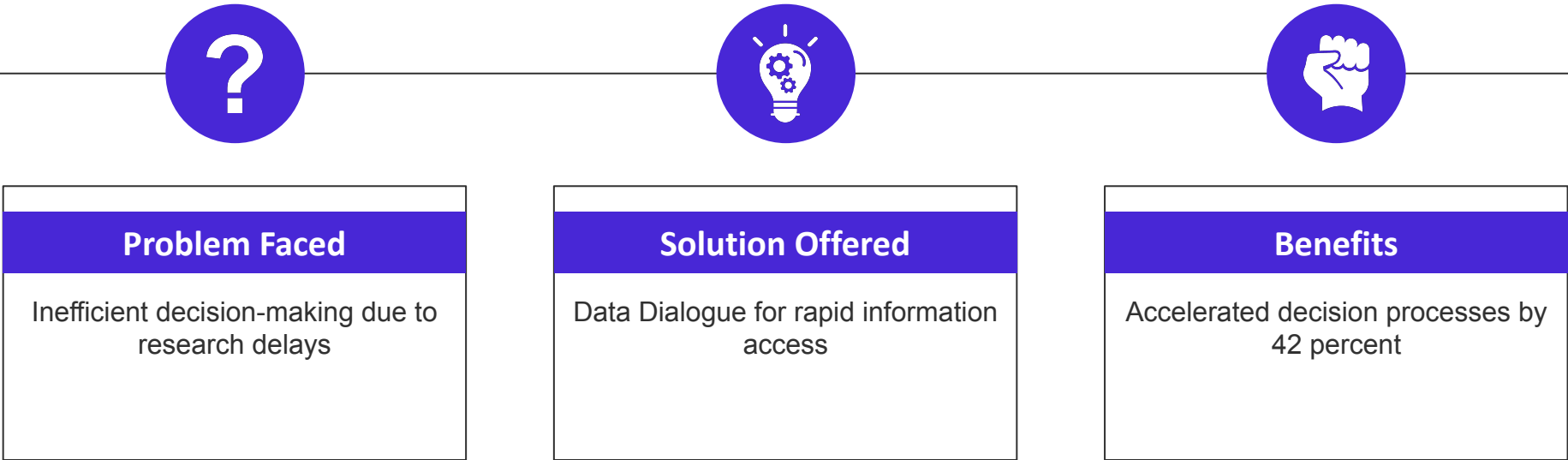
Case Study: Client Retention Success



Case Study: Multi-Generational Wealth Strategy



Case Study: Global Market Intelligence Impact



Methodology and Sources of Data



01

Quantitative Data

Utilized statistical data from reliable financial industry reports.

02

Peer Review

Conducted interviews with industry experts for deeper understanding.

03

Market Reports

Analyzed findings from McKinsey and Deloitte on wealth management.

04

Case Studies

Reviewed real-life applications of AI in wealth management firms.

05

Industry Analysis

Evaluated competitive landscape and current market trends.

06

Client Surveys

Gathered feedback from clients regarding service expectations.

07

Data Compilation

Synchronized quantitative and qualitative data for comprehensive assessments.

08

Expert Consultation

Engaged with consultants to validate methodologies and data sources.

Conclusions: The Crucial Industry Transition



01

Market Growth Surge

High-net-worth assets projected to reach \$210 trillion by 2025.

02

Client Engagement Need

37% of client interactions occur outside traditional business hours.

03

AI Integration Importance

Implementing AI solutions can significantly boost client retention.

04

Compliance Challenges Rising

Wealth management firms face increased regulatory scrutiny and compliance costs.

05

Innovative AI Solutions

Asset Velocity AI's tools enhance operational efficiency and client experience.

06

Future Readiness Imperative

Adopting AI is crucial to remain competitive in a changing landscape.

Call to Action for Wealth Management Leaders

01 **Assess AI Potential**
Evaluate current practices to identify AI integration opportunities.

02 **Schedule Demonstrations**
Arrange live demonstrations of AI solutions for decision-makers.

03 **Engage Pilot Programs**
Initiate pilot projects to test AI solutions in real scenarios.

04 **Conduct ROI Analysis**
Perform cost-benefit analyses to evaluate potential gains from AI.

05 **Optimize Compliance Tools**
Explore AI-driven compliance solutions to enhance regulatory adherence.

06 **Leverage Client Insights**
Utilize AI analytics to refine client understanding and engagement strategies.

Step-by-Step Implementation Roadmap

01

Assessment

Conduct a thorough analysis of current systems and identify areas for AI integration to enhance operations.

02

Pilot Program

Implement a small-scale pilot of AI solutions to evaluate effectiveness and gather feedback from key stakeholders.

03

Full Integration

Deploy AI technologies organization-wide, ensuring compatibility with existing infrastructure and training staff on new systems.

Cost-Benefit Analysis of AI Solutions

	Short Term	Medium Term	Long Term	Total Investment	ROI
Investment Costs	\$20,000	\$50,000	\$90,000	\$160,000	30%
Operational Cost Savings	-\$35,000	-\$150,000	-\$800,000	-\$985,000	40%
Increased Revenue	\$0	\$500,000	\$2,000,000	\$2,500,000	50%
Compliance Cost Reduction	\$70,000	\$177,000	\$400,000	\$647,000	25%

Emerging Trends: AI and ESG Compliance

01

Data Analytics

Utilize AI for real-time ESG data analysis and reporting.

02

Risk Assessment

Leverage AI to evaluate compliance risks in investment strategies.

03

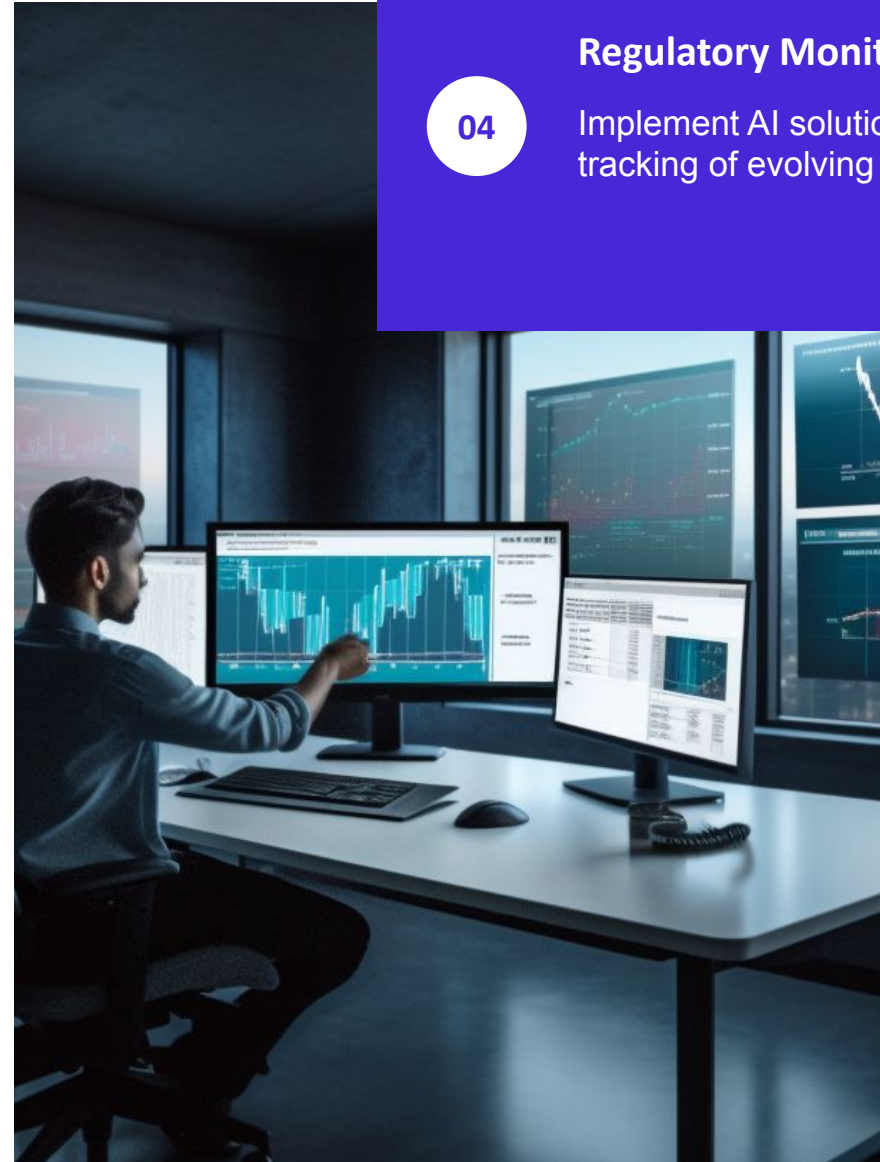
Client Engagement

Employ AI-driven tools for personalized ESG impact communication.


04


Regulatory Monitoring


Implement AI solutions for proactive tracking of evolving ESG regulations.




Audience Engagement: Q&A Session


 **Prepare Answers**
Anticipate potential questions from the audience and prepare comprehensive answers for each.

 **Encourage Participation**
Promote an open environment where participants feel comfortable asking questions during the session.

 **Clarify Topics**
Ensure that complex topics covered in the presentation are clarified and easily understandable for audience members.

 **Time Management**
Allocate a specific time for the Q&A segment to maintain the overall flow of the presentation.



 **Engage Directly**
Directly engage with audience members who ask questions to foster a dynamic and responsive discussion.

Key Metrics for Measuring AI Impact

Retention

47

AUM Growth

41

Churn Reduction

37

Compliance Cost

15

Strategic Partnerships for AI Integration

01

Identify Partners

Locate fintech companies that specialize in AI solutions to enhance wealth management tools and services.

02

Collaborative Development

Engage in joint ventures with partners to co-create AI technologies tailored for optimizing client engagement processes.

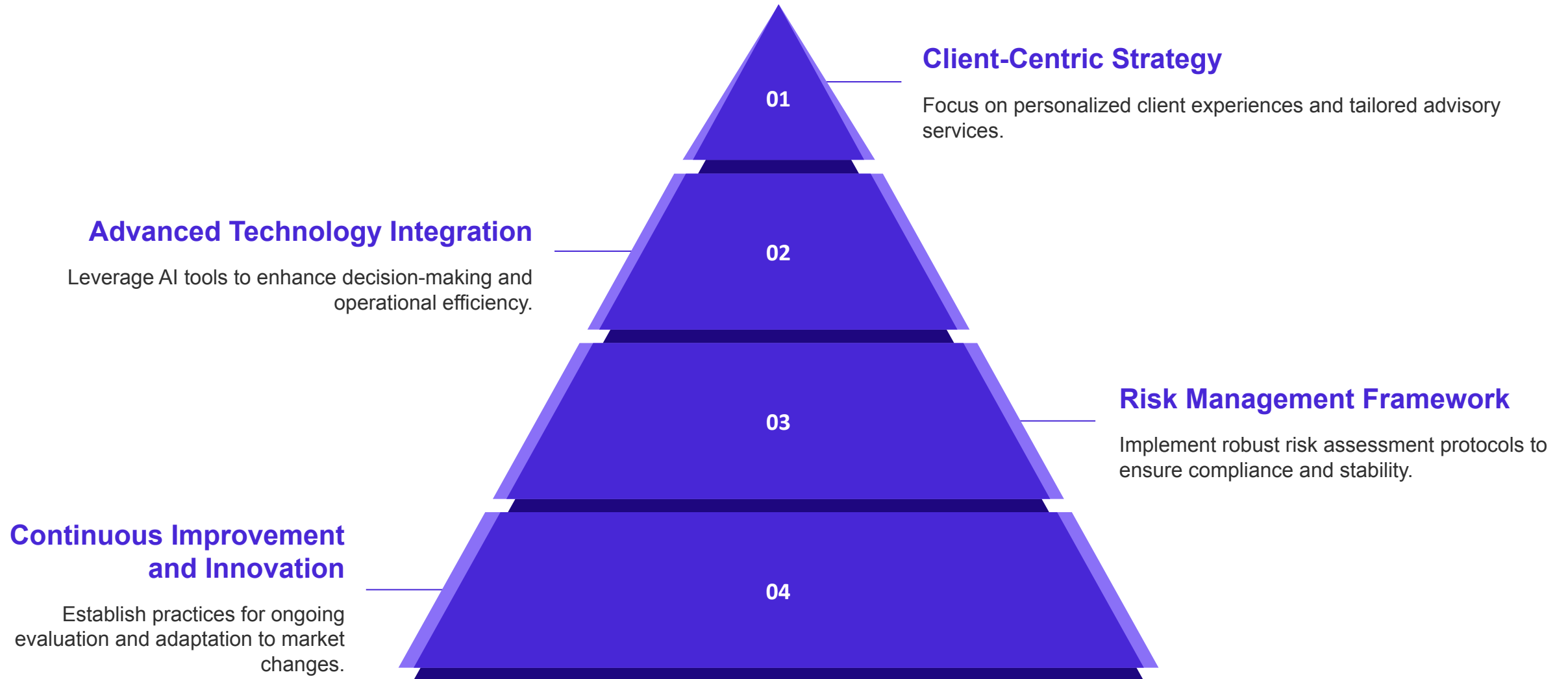


03

Compliance Focus

Work with regulatory tech firms to ensure AI solutions adhere to compliance standards while improving operational efficiency.

Building a Sustainable Wealth Management Model



THANK YOU FOR YOUR INTEREST IN ASSET VELOCITY AI



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