ADVISOR AI TECH MAP

Q2 2024 Update:

The Advisor's Guide to understanding how AI works to enhance daily workflows for speed and growth

YourStake

What does AI have the capability to do for Advisors right now?

YourStake

Content Creation + Marketing

Notes + CRM

Analysis Assistant

Client Support

Document Extraction + Presentation

New!
Compliance

AI for Marketing/Content Creation

YourStake

- Create personalized email copy, outreach faster

- Generate 1st draft blog, website, and newsletter content to engage with clients and prospects and grow your practice

Tools doing this now

fmg

ANTHROP\C

AI for Client Support

YourStake

- Automatic alerts and client segmentation
- Customer support chatbots
- Prospect Scoring and analysis

Tools doing this now

WHIZARD

CATCHLIGHT

AI for Notes and CRM

YourStake

- AI meeting transcripts + summary + evaluation
- Convert meeting notes into CRM fields, email reach out

Tools doing this now

FinMate AI
AI Assistant for Financial Advisors

Sybill

Compliance

YourStake

- Automate compliance review of materials
- Proactively catch compliance issues earlier and quicker

Tools doing this now

REGVERSE

AI Analysis Assistant

YourStake

- Understand Market Commentary
- Derive portfolio insights

Tools doing this now

Morgan Stanley

Chat with Market Analyst

YourStake

Chat with Portfolio

AI Document Extraction + Presentation

YourStake

- Read and format information from PDFs
- Instant personalized analysis and presentation

Tools doing this now

holistiplan

Tax Planning

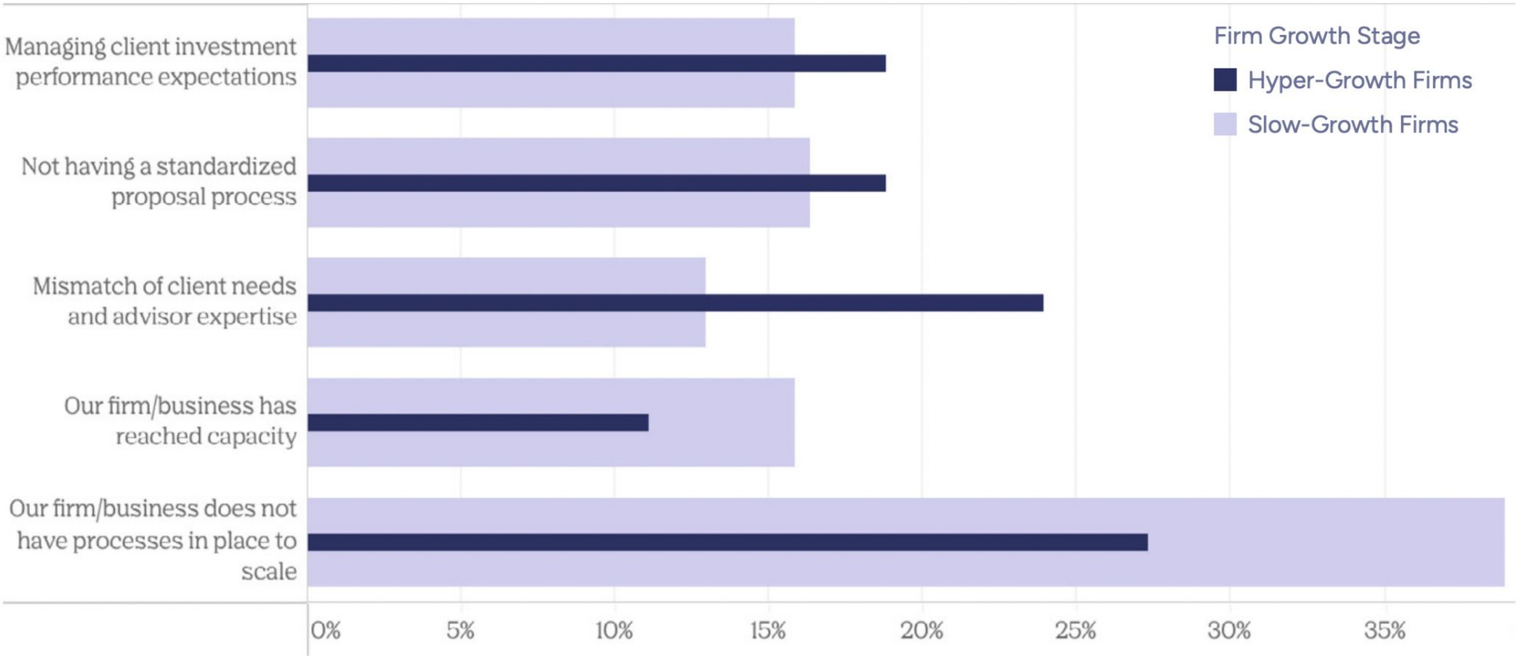
YourStake

Proposal Generation

What YourStake does with AI – help you grow your business

YourStake

The biggest barrier of converting a prospect to a client



Page 12, Nitrogen Growth Survey Report, 2023

The path of converting a prospect to client for high growth RIAs

YourStake

Initial contact + meeting	Collect financial information	Internal analysis / Proposal prep	Client decision	Client onboarding
Prospective clients make contact through web forms, phone calls, walk-ins or referrals, and has initial meeting	Advisor requests information about investments, tax, insurance, etc. to prepare investment analysis and plan	Advisors/staff begin to review financial statements and identify the gaps between where they are and the goals they have expressed.	Advisors & staff present to the client a proposal and begin relationship with client	Client begins onboarding process with advisor

1 week

1 day to 1 week

Speed to Proposal and Optimization = Growth

YourStake

Initial contact + meeting

Collect financial information

Internal analysis / Proposal prep

Client decision

Client onboarding

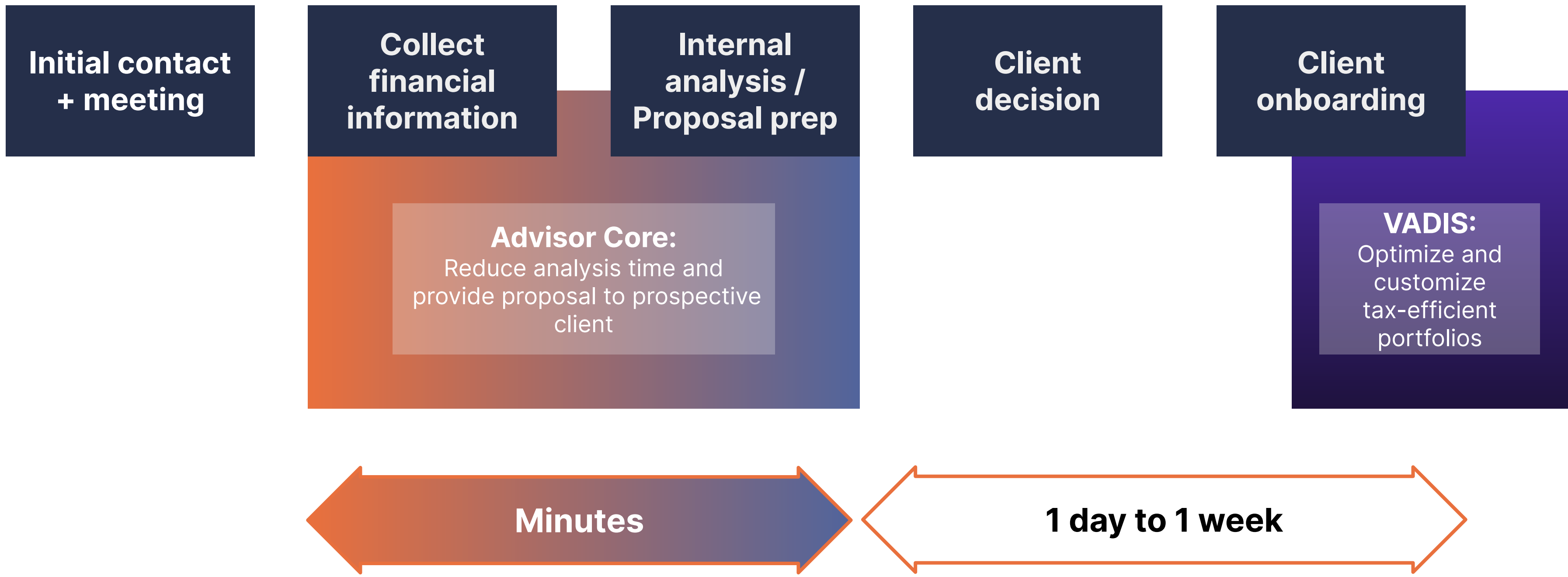
Advisor Core:
Reduce analysis time and provide proposal to prospective client

VADIS:
Optimize and customize tax-efficient portfolios

Minutes

1 day to 1 week

Speed to Proposal and Optimization = Growth



VADIS + AdvisorCore Workflow

YourStake

1. Discover Client Preferences

Discover client risk and values with the built in questionnaires and select any exclusions and inclusions if needed

2. Optimize

Using these parameters, the VADIS workflow optimizes a portfolio with the ability to further refine values as needed

3. Analyze

View analytics in AdvisorCore, make adjustments if necessary

4. Propose

Generate side-by-side proposal of optimized portfolio vs. current or benchmark

5. Implement

Implement seamlessly across selected custodians

6. Monitor and Report

Monitor, rebalance, and report across platforms

About YourStake

YourStake

YourStake provides technology solutions that power the amazing for Advisors and their clients.

Founded in 2019, YourStake serves over 300 advisor firms, including top RIAs and broker dealers cross the wealth management industry as well as asset managers and TAMPs. YourStake is SOC2 Type 2 certified and is proud to be a top-rated tools according to customer satisfaction by T3/Inside Information 4 years in a row.

Advisor Core by YourStake enables advisors to win more clients with faster proposal turnaround

VADIS enables advisors to provide custom values-aligned direct indexing to their clients

Values Hub helps align client portfolios with their values using a discovery questionnaire, investment research tools, and NoScore transparent data.

Top rated platform based on advisor satisfaction across three categories in 2024

Technology Tools for Today

Discover Advisor Core to grow your practice and deliver personalized proposals and portfolios

Scan to schedule demo