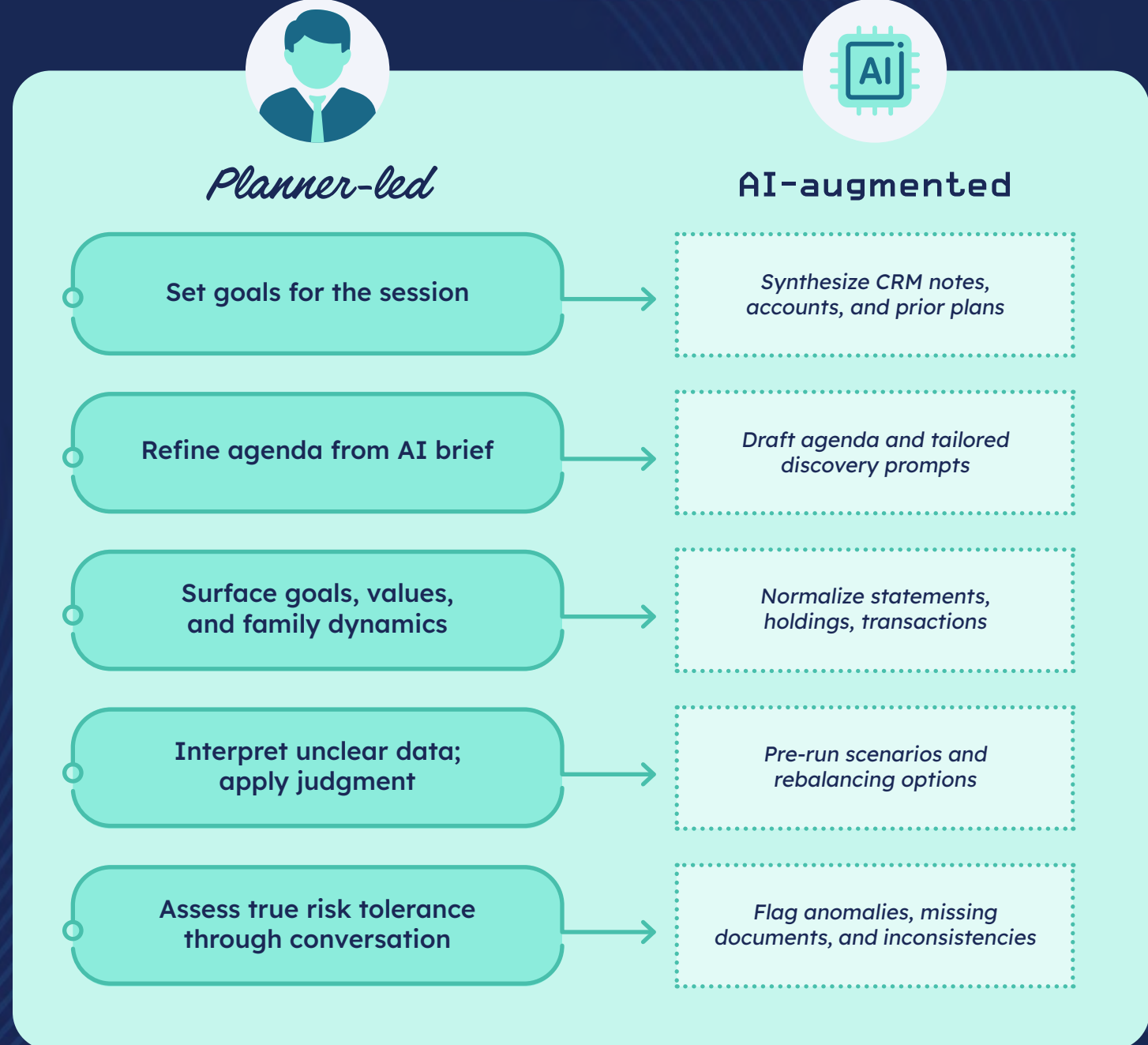


What Planners Do vs. What AI Does

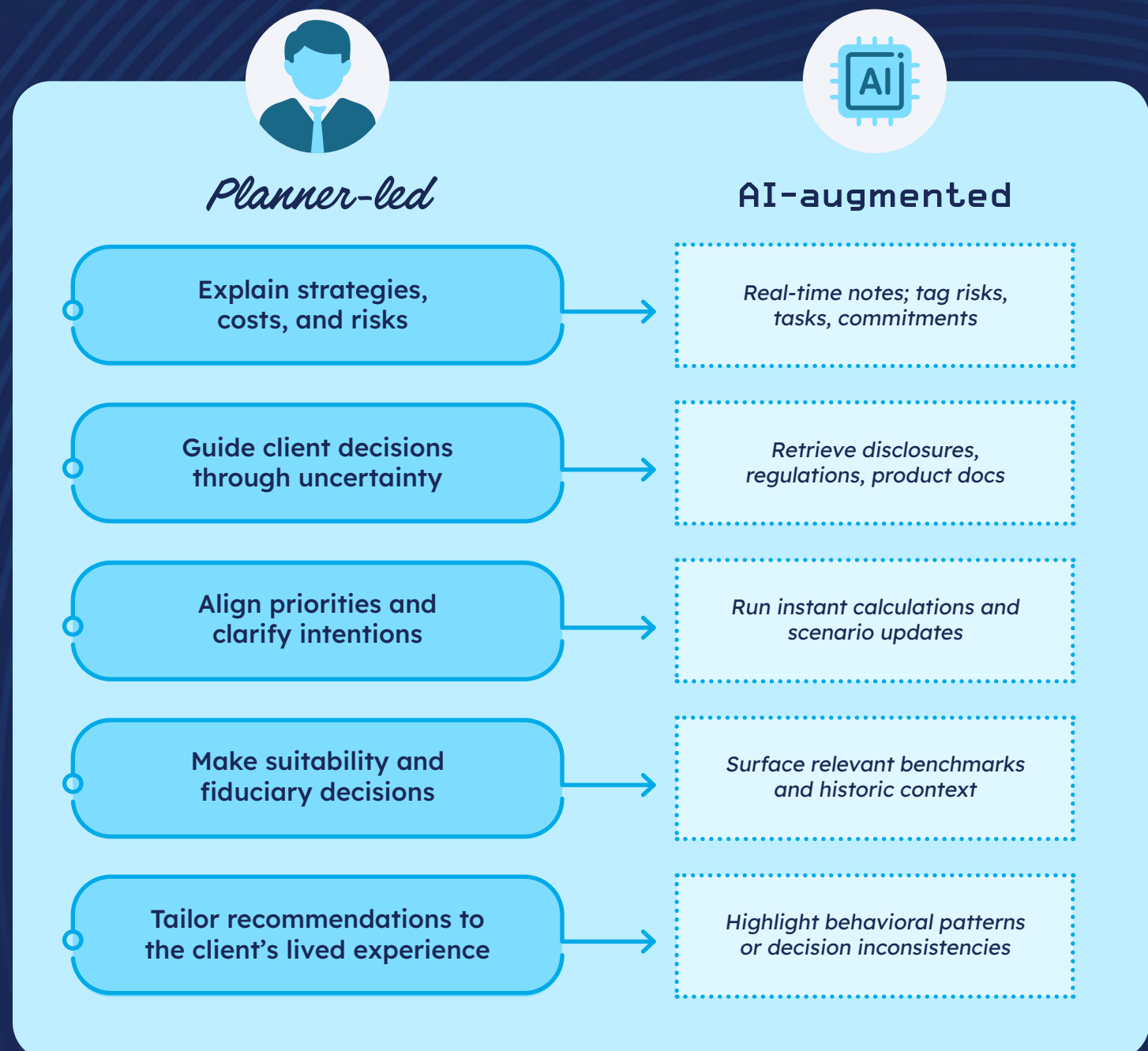
The Planner-led, AI-augmented Client Meeting

Across the industry, professionals continue to use artificial intelligence in workflows and applications. As AI's use increases, one thing remains constant: *planners lead, AI optimizes.*

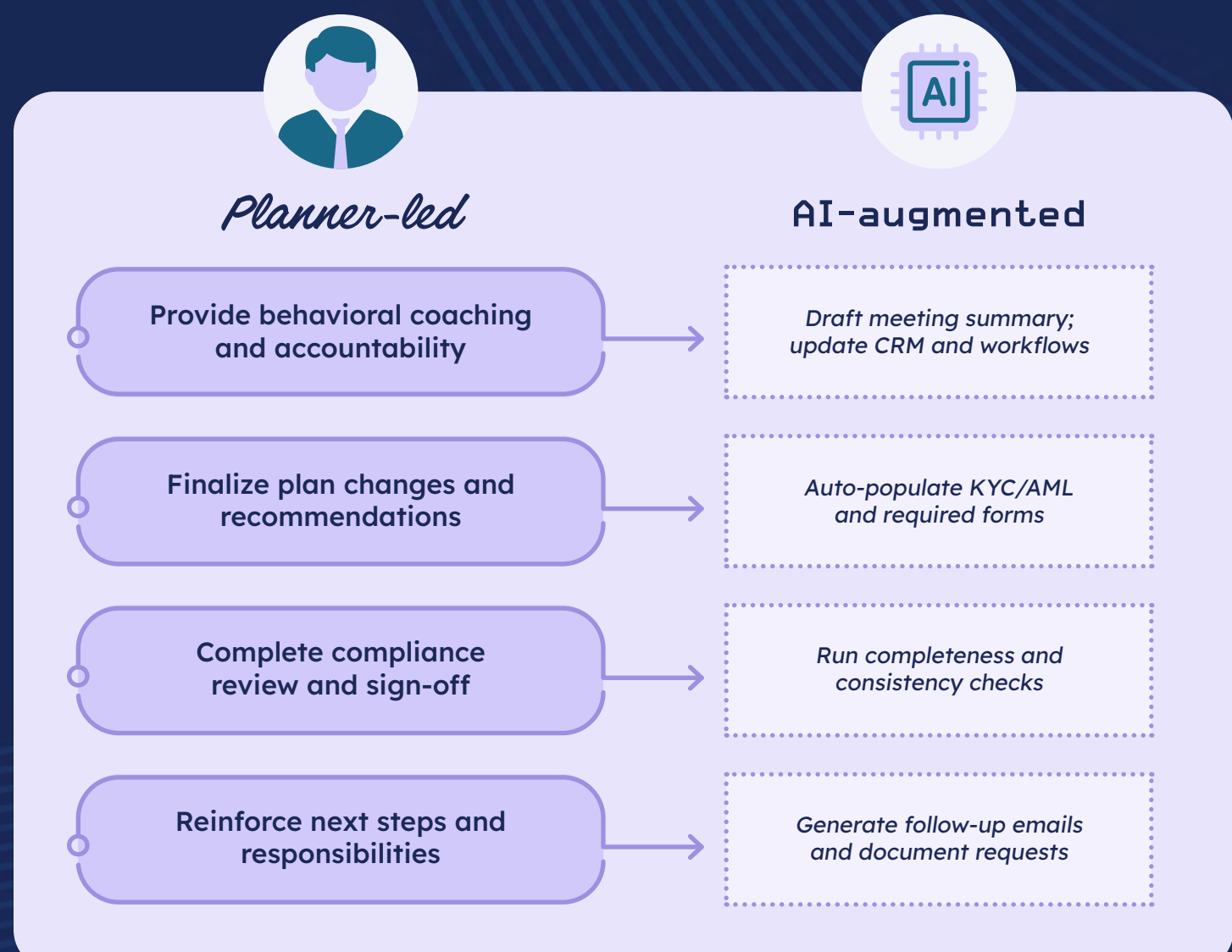
BEFORE THE MEETING



DURING THE MEETING



AFTER THE MEETING



ROLE SUMMARY

Humans Do What Only Humans Can

- Empathy
- Judgment
- Trust-building
- Personalization
- Coaching

Planners Lead

The planner explains, personalizes, and approves all client-facing advice.

AI Does What AI Does Best

- Automation
- Accuracy
- Speed
- Normalization
- Compliance Support

AI Optimizes

AI drafts and flags.

As with any new technology, RIA's should ensure compliance with regards to safeguarding client data prior to implementation.