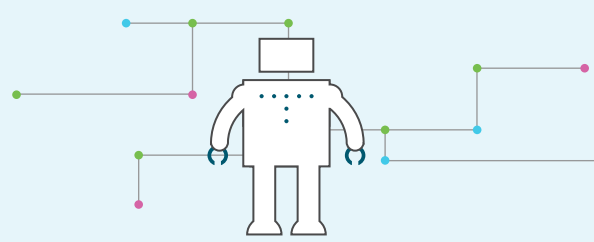


ARTIFICIAL INTELLIGENCE AND WEALTH MANAGEMENT

Every time your client has to wait, you get closer to seeing them walk out the door. That's why brokerage firms, registered investment advisors and other wealth managers are all looking for tools to help cut out wait times, improve the client experience and reduce the cost of delivery.

If this includes you (and it should), one strategy that cannot be ignored is artificial intelligence (AI). Specifically, there are two forms of AI that can help return your attention to where it really belongs – the client.

Robotic Process Automation



RPA tools, regularly referred to as bots, can function as a virtual workforce. Cheap and easy to implement, they support a range of enterprise and document management functions that include:



Identity documentation collection



Trade reconciliation and settlement



Document indexing and archiving



Data distribution

RPA

OCR

Optical Character Recognition

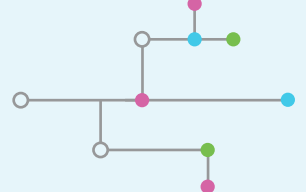


OCR is another form of AI that automates the classification of and extraction of data from captured document. OCR actually kicks off the document management process as a whole and removes time-consuming manual tasks like:

IA

Intelligent automation

Both RPA and OCR feed into the funnel of IA, which is a combination of automation and artificial intelligence. IA tools target areas where wealth managers do repetitive, relatively simple tasks that don't require human analysis to complete, providing benefits like:



Increased visibility into workflow processes



Faster access to required information



Improved and expedited customer interactions

Content services:

A foundation for intelligent automation

Investing in a content services platform can be one of your strongest options for intelligent automation. Content services not only provide the tools that drive improved productivity and customer service, it also empowers digital transformation across your organization through:

- RPA tools for automation of low value, repeatable tasks
- OCR capabilities for data and information gathering
- Flexible solutions that can be shared and deployed in all departments
- End-to-end digitization of lifecycle management processes
- Self-service and mobile applications for client empowerment

Learn more at [Hyland.com/WealthManagement](https://hyland.com/WealthManagement) >>

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