

# Recordsure AI

## Improved efficiencies & compliance



for financial services

Recordsure AI, unique conversation and document analytics solutions

- Capture, review and analyse 100% of customer interactions
- Increase effectiveness and productivity of advisers and paraplanners
- Boost efficiencies and performance of your compliance function



**Introduce new admin efficiencies so advisers can spend 50% more time with clients**

### ConversationAI

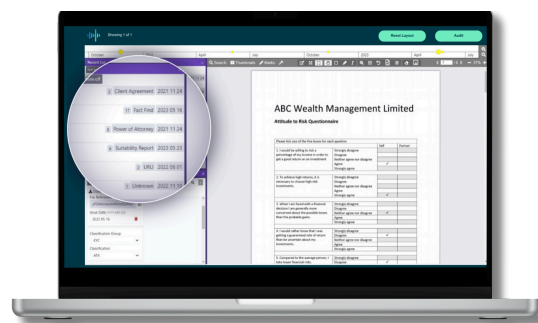
- ✓ Securely capture 100% of in-person and online conversations
- ✓ Get authoritative transcripts
- ✓ Easy-to-access, searchable records of 100% of client conversations
- ✓ Create meeting notes 80% faster with AI
- ✓ Advisers spend 50% more time with clients: improved client experience and understanding of client objectives
- ✓ Significant efficiencies in the hand-off process between paraplanners and advisers
- ✓ Increase effectiveness and productivity of your teams



**Improve adviser performance with consistent, structured and evidence-based feedback loop**

### ReviewAI

- ✓ Unique AI conversation and document analytics created for advice firms
- ✓ Deliver automated oversight and greater assurance on 100% of interactions
- ✓ Supercharged reviews in half the time
- ✓ Improved adviser performance thanks to consistent, structured and evidence-based feedback loop
- ✓ Fully integrated with major practice management systems
- ✓ Underpinned by comprehensive and flexible real-time MI solution
- ✓ Boost the efficiency and performance of your compliance function



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ReviewAI combines smart people with smart tech to advance the efficiency of your review process

## Automated AI reviews

- ✓ Resolve new advice cases with incomplete documentation
- ✓ Identify ongoing service reviews that have not taken place
- ✓ Highlight non-compliant elements of advice conversations
- ✓ Automatically select cases for review via a risk-based approach

## AI-powered human reviews

- ✓ 2x faster suitability reviews
- ✓ Identify the root cause of non-compliance and change behaviour with an evidence-based feedback loop
- ✓ 5x faster remediation project delivery
- ✓ Justify historic ongoing service fees with clear audit trails

## Case study

**Approved for use by UK and Australian regulators to deliver specific large-scale remediation projects.**

### Client project:

ReviewAI processed 1m+ years of ongoing service fees, 90m documents and checked £5bn service fees.



## Recordsure AI is proven, ready-to-use AI technology

Built on industry-leading expertise with rapid-to-deploy technology, Recordsure AI is designed for practitioners by practitioners, offering seamless integration with practice management systems. We've provided over 12 years of experience delivering to advice firms, tier 1 banks and the UK Government.



Book a demo

