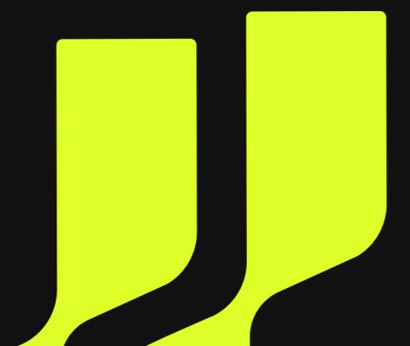




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The AI-powered advisor:
**10 tasks you'll
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How modern advisors are using AI to reclaim their time and scale their business.

You didn't become a financial advisor to spend your days buried in admin work. But let's face it — somewhere along the way, that's what the job has started to look like. Instead of focusing on strategy, relationships, and growth, your calendar fills up with follow-up emails, paperwork, scheduling, CRM updates, and compliance checks.

It's probably not why you chose this profession. And it's not where you add the most value.

The good news? Technology has finally caught up with your ambition. Artificial intelligence — once a futuristic buzzword — is now a practical tool that's quietly transforming financial practices. It's no longer about what AI might do someday. It's about what it can do for you right now.

Today, AI can take on the repetitive, time-consuming tasks that slow you down. It can draft emails, log notes, surface client insights, manage follow-ups, and even schedule meetings — all while you stay focused on your clients and your growth.

This guide will show you how. Inside, you'll discover **10 everyday tasks that AI can handle for you** — not in theory, but real, advisor-friendly workflows that top practices are already using.

It's time to shift from admin overload to advisor excellence. Let's dive in.

Why AI now?

If you've been waiting for the right moment to explore AI for your practice, that moment is here.

For years, artificial intelligence felt like future tech — something for big firms with huge budgets or Silicon Valley startups, not for financial advisors managing client relationships day to day. But today, AI is already woven into the tools you use. It powers modern CRMs, enhances email platforms, streamlines scheduling apps, and simplifies compliance workflows. And the best part? You don't need to be a tech expert to benefit.

Top advisory firms are already putting AI to work to scale operations without scaling headcount. They're automating repetitive tasks that used to eat up hours, like drafting follow-up emails, filling forms, logging meeting notes, or tracking deadlines. The result? They serve more clients, deliver a more consistent experience, and free up time for high-value conversations.

For small practices, AI levels the playing field. For larger firms, it provides the operational leverage to grow without adding complexity.

The bottom line? AI is no longer optional for firms that want to stay competitive.

When you can reclaim hours spent each week through automation, you gain a powerful edge — more time to strengthen client relationships, pursue new business, and build the kind of practice you envisioned when you started.

AI doesn't just change how you work. It changes what's possible.

Drafting client emails

Every client conversation — whether it's a quick phone call or a detailed review meeting — deserves a thoughtful, professional follow-up. It's how you confirm next steps, reinforce key points, and show your clients that you're attentive and reliable. But writing these follow-ups takes time.

Think about it: even if you spend just 10 to 15 minutes drafting each email, that time adds up fast across dozens of client interactions each month. And that doesn't include the mental load of trying to remember what was discussed, what was promised, and what tone is right for each client.

This is where AI becomes your secret weapon. With the right AI tools, you can generate clear, compliant, and personalized follow-up emails in seconds. By pulling directly from meeting notes, call transcripts, and client records, AI can:

- Summarize what was discussed
- Outline agreed-upon action items
- Reinforce key advice or decisions
- Suggest scheduling the next touchpoint

Because these drafts are generated based on your real client data, they reflect the unique context of each relationship — no cookie-cutter templates and no generic language. You review, fine-tune if needed, and hit send.

Real-world impact: Advisors who adopt AI for follow-ups report saving 15–20 minutes per client interaction. Over a week, that can mean several hours returned to your calendar, time you can spend deepening relationships, prospecting, or simply focusing on higher-value work.

AI takes care of the words so that you can take care of the relationship.

Prepping for annual reviews

Annual reviews are one of the most valuable moments in the client relationship. It's your opportunity to reconnect, demonstrate value, and guide your clients toward their goals. But preparing for these meetings? That's another story.

Too often, review prep means hours spent pulling data, digging through notes, and piecing together the client's story. What decisions were made last year? What goals were set? Were there follow-up items that fell through? How did the portfolio perform relative to those objectives?

It's a manual, fragmented process — and one that pulls your focus away from what matters: the conversation with the client.

AI changes the game. With the right tools in place, AI can automatically surface:

- Key portfolio metrics and performance highlights
- Prior meeting notes, decisions, and action items
- Important life changes or milestones captured in your CRM
- Open tasks or follow-ups that need to be addressed

Instead of starting from scratch, you walk into the meeting fully equipped, with the insights you need at your fingertips—no more hunting through files, spreadsheets, or scribbled notes.

AI transforms review prep from a time sink into a strategic advantage. When you're better prepared, the meeting is more productive, and your client walks away with greater confidence in your partnership.

Creating meeting summaries & tasks

Every client meeting is packed with essential details — key decisions, commitments made, and next steps to take. But capturing all of that in the moment? That's not easy. You're focused on listening, advising, and guiding the conversation, not frantically jotting notes or trying to remember every detail afterward.

That's where AI-powered note takers come in. These tools work silently in the background during your meetings to record, transcribe, and identify key points as they happen. As the meeting wraps up, AI generates a clear and organized summary that highlights the key decisions made, assigns action items, and identifies any follow-ups that are needed.

No more scrambling to remember what was agreed upon. No more deciphering half-written notes or relying on memory to log tasks in your CRM.

The result?

- Reduced human error — nothing falls through the cracks
- A consistent, professional record of every meeting
- Automatic creation of tasks and reminders so you can focus on your next client

Advisors who use AI tools to automate their meetings report a 90% reduction in admin work and over 20 hours saved/month.

AI tools ensure that every commitment you make is captured — and followed through — without adding work to your plate. It's like having a personal assistant dedicated to holding you accountable.



Tracking RMD deadlines

Required Minimum Distributions (RMDs) are a critical part of managing retirement accounts, and staying on top of them is both time-consuming and high-stakes. With shifting rules, changing ages, and a growing client base, manually tracking who's due and when can quickly become a logistical headache.

Missed RMDs aren't just an administrative slip; they can lead to costly penalties for your clients and create unnecessary risk for your firm. Traditionally, advisors have relied on spreadsheets, calendar reminders, or custom reports to manage this, all of which are prone to human error and require constant upkeep.

AI offers a smarter solution. By integrating directly with your CRM and client data, AI can automatically monitor:

- Age milestones that trigger RMD eligibility
- Account types subject to RMD rules
- Deadlines based on individual client circumstances

When an RMD is approaching, AI can flag it for you, generate reminders, and even help draft client outreach — all before the deadline looms. No more manual tracking, no more sleepless nights wondering if something slipped through.

Never miss a regulatory deadline again. Let AI handle the calendar so you can focus on advising, not auditing.

Sending birthday & milestone greetings

The small things often leave the biggest impression. A thoughtful birthday message. A note recognizing a client's retirement date, a child's graduation, or an anniversary of working together. These simple gestures remind clients that you see them as people, not just portfolios.

However, as your client base grows, keeping up with these personal touchpoints becomes increasingly challenging. Important dates slip through the cracks. The task of tracking, drafting, and sending these messages starts to feel like one more chore on an already full list.

AI tools make it easy to scale this part of your client service, without losing the personal touch. By integrating with your CRM, AI can:

- Automatically track birthdays, age milestones, anniversaries, and other important dates
- Draft warm, personalized messages that sound like you
- Schedule and send these greetings at just the right time

The result? Clients feel valued. You maintain meaningful connections without lifting a finger. What once felt impossible at scale becomes a seamless part of your client experience.

AI helps you show up for clients in ways that matter most — and that they'll remember.

Triaging client requests

In any given week, you receive a flood of client communications — emails, calls, portal messages, and texts. Some require immediate action. Others include routine updates, quick questions, or requests that can be put off or handled by your team.

The challenge? Sorting through it all. Without a system, it's easy to feel reactive, spending valuable time on low-priority tasks while urgent needs risk being overlooked.

This is where AI delivers real-time clarity. By integrating with your communication channels, AI tools can:

- Scan and categorize inbound messages
- Flag urgent or time-sensitive requests
- Route routine matters for delegation or automation
- Surface trends, like frequently asked questions that can be addressed at scale

Instead of working through your inbox in order, work through it strategically, focusing first on what matters most to your clients and your business.

AI helps you stay proactive, not reactive, and ensures no client request is left behind.

Filling forms & generating docs

If there's one task that drains time and energy across every advisory firm, it's paperwork. Whether it's onboarding forms, account applications, transfer requests, or planning documents, the process is the same: track down client information, type it in manually, check for errors, and repeat.

Manual data entry isn't just slow — it's risky. A mistyped number or missed field can cause delays, create compliance headaches, or lead to a poor client experience.

AI streamlines this from start to finish. By pulling data directly from your CRM, AI can:

- Pre-fill forms with accurate, up-to-date client information
- Generate standard documents with just a few clicks
- Reduce errors by eliminating double entry
- Help ensure forms are complete and compliant

The result? You spend less time on repetitive paperwork and more time delivering value. Clients experience faster service, and your team regains hours that were previously lost to manual tasks.

With AI, what once felt tedious now happens seamlessly in the background.



Scheduling routine check-ins

Strong client relationships aren't built in annual reviews alone — they're nurtured through regular, meaningful contact. But in the day-to-day demands of running your practice, it's easy for routine check-ins to slip down the priority list. Weeks turn into months, and clients who should have heard from you don't — simply because there wasn't enough time to keep track.

AI changes that. By integrating with your CRM and client records, AI can:

- Track when you last met or spoke with each client
- Factor in client tier, service level, and key milestones
- Identify when it's time for a check-in, before clients feel neglected
- Suggest and even schedule meetings automatically, reducing back-and-forth

The result? Every client receives timely, proactive outreach — whether they're your largest account or a household just starting out. You maintain a consistent cadence without adding to your to-do list, and your clients feel valued and supported throughout the year.

AI helps ensure that no client feels forgotten, and no connection is missed.

Tagging & categorizing CRM records

A well-organized CRM is the backbone of an efficient, growth-ready practice. But keeping it that way? That's often easier said than done. Over time, client records can become messy — missing tags, inconsistent categories, and outdated segmentation — and what should be your most valuable tool becomes a source of frustration.

Every time you or your team searches for the right clients to contact, creates a report, or runs a campaign, the clutter slows you down and introduces risk.

AI helps keep your database clean, consistent, and actionable — without manual upkeep. By analyzing client data and behavior, AI can:

- Automatically tag clients by service level, tier, or priority
- Update categories based on life stage, milestones, or recent activity
- Ensure your segmentation stays aligned with your practice goals

The result? You spend less time cleaning up data and more time using it to drive meaningful actions — from targeted outreach to personalized service.

Say goodbye to messy databases and hello to a CRM that works as hard as you do.

Logging notes & next steps after calls

Every client call is packed with essential details — questions asked, advice given, promises made, and next steps agreed upon. Capturing all of that accurately is crucial for delivering excellent service and ensuring follow-through. But after a long day of back-to-back calls, the last thing you want is to pause and scribble notes or manually update your CRM.

That's where AI steps in. With AI-powered transcription and logging, you can:

- Automatically capture the full conversation
- Generate a clear, concise summary of key points
- Highlight action items and next steps
- Instantly log everything in the right place in your CRM

No more worrying about missing a detail or forgetting a commitment. AI ensures a consistent, accurate record, without adding to your workload.

Free your mind for what's next. With AI handling the details, you can move confidently from one client to the next, knowing every interaction is properly documented.

The AI-driven practice of the future

Imagine your ideal workday. A day where follow-up emails go out automatically — personalized, professional, and on time. A day where your meeting prep is already done for you, with key data and notes at your fingertips before you even sit down. A day where every client conversation is captured, summarized, and logged without you lifting a finger.

That's not a distant dream. That's the reality that top advisory firms are building today. They're using AI to handle the busywork — the repetitive tasks that used to fill their calendars and pull focus from what truly matters.

With AI, these firms are scaling faster, serving clients better, and doing it all while keeping the personal touch that sets them apart. They're not working harder — they're working smarter.

And here's the key: **AI doesn't replace you. It frees you.**

It frees you to focus on what only you can do: advising clients, building relationships, and leading your practice into the future.

AI isn't about doing less. It's about doing more of what matters.
The future is here — and it's yours to embrace.



Ready to see these automations in action?

Slant is the AI assistant purpose-built for financial advisors, combining CRM essentials with intelligent automation that helps you reclaim your time, strengthen client relationships, and scale your business without added complexity.

The tasks outlined in this guide aren't theoretical. With Slant, they're reality — designed to work with the way you already serve clients and grow your practice.

Book a demo today and discover what Slant can do for your firm.

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