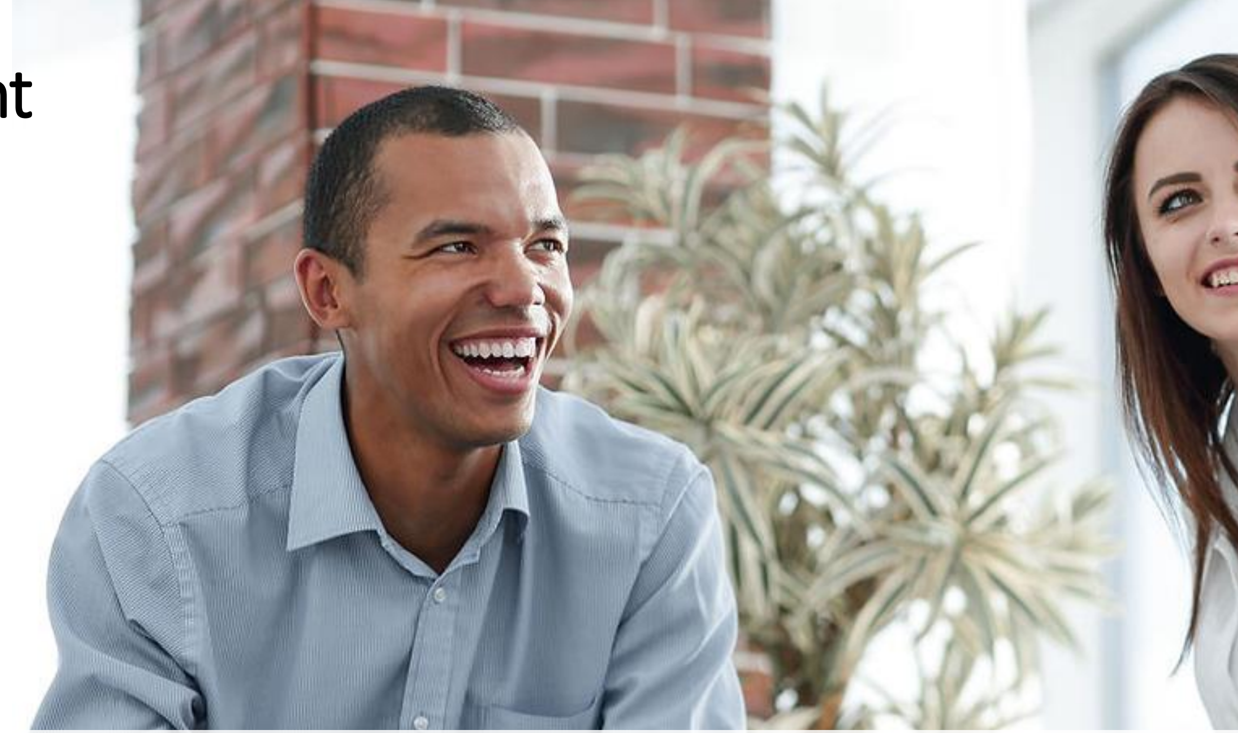
COGNICOR

AI Digital Assistants for Wealth Management

Wealth Manager's Assistant

Regain relationship time



- Client Meetings
- Client Maintenance
- Onboarding
- NIGO Free Forms
- Lead Generation

Easy 3 Step Setup

Platform

COGNICOR

- Digital Assistant
- CogniCor Knowledge Graph Platform
- Azure Open AI Service

ROI

60%	90%	50%
Calls avoided	NIGO reduction	Advisor's time saved

Home Office Assistant

Empowered to Support

Policies and Procedures

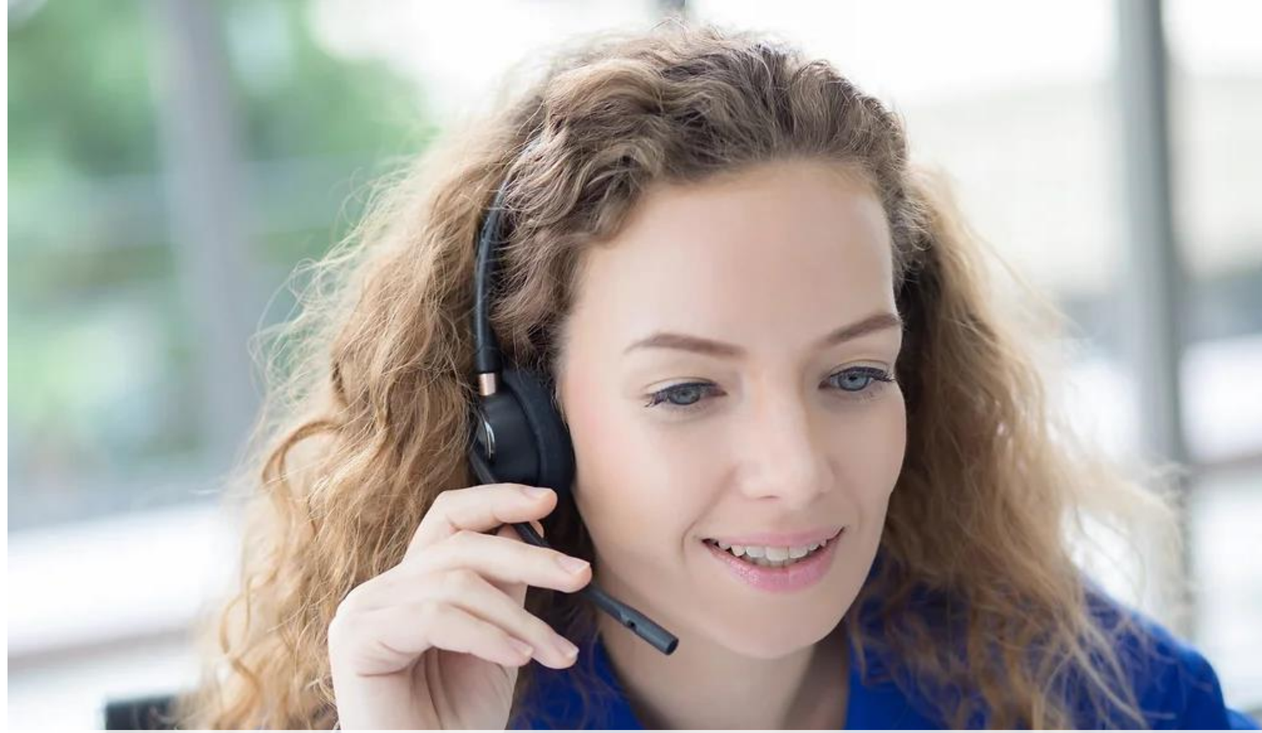
Case Resolution

Agent Training

Next Best Actions

Status checking

Easy 3 Step Setup



Platform

COGNICOR

Digital Assistant

CogniCor Knowledge Graph Platform

Azure Open AI Service

ROI

40%
Reduction in AHT

95%
First call resolution

60%
Faster onboarding

Policy Holder's Assistant

Empowering Self Service

- Account Queries
- Self service
- Advisor Matching
- Advisor Meetings
- e-Authorizations

Easy 3 Step Setup

Platform

COGNICOR

Digital Assistant	CogniCor Knowledge Graph Platform
Azure Open AI Service	

ROI

60%	90%	50%
Calls avoided	Faster Onboarding	Time saved