

Emerging Advice Tech

Mark Papendieck
Chief Commercial Officer



The background of the slide features a series of concentric, wavy lines in shades of teal and dark blue, creating a ripple effect. On the left side, the word "DASH" is written in a white, stylized, sans-serif font. A thin vertical teal line is positioned to the right of the word.

DASH

01 Will everyone shut up about AI!

02 Decision sets have changed

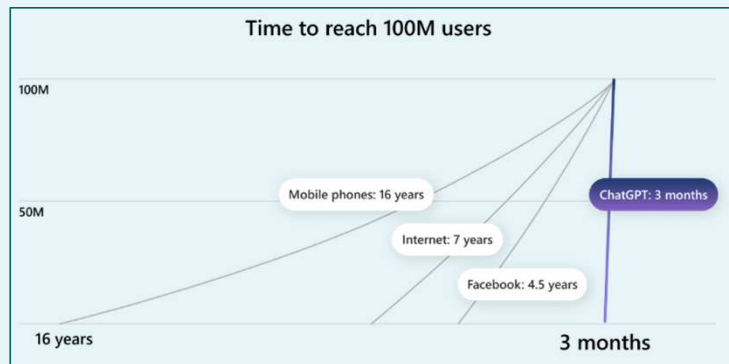
03 Wings on a caterpillar

04 Putting the structure to work

05 Your biggest risk

Will everyone please shut-up about AI !

- It doesn't matter if you 'believe' in AI or not, economics always wins.
- This isn't 'just like the internet'.

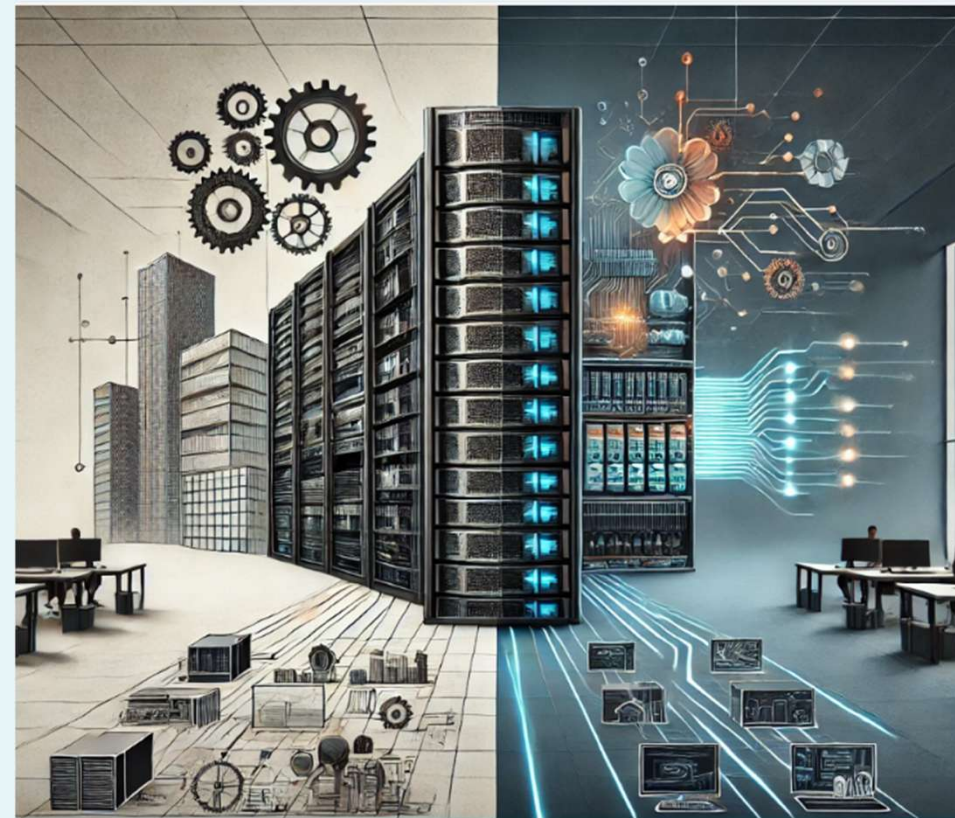
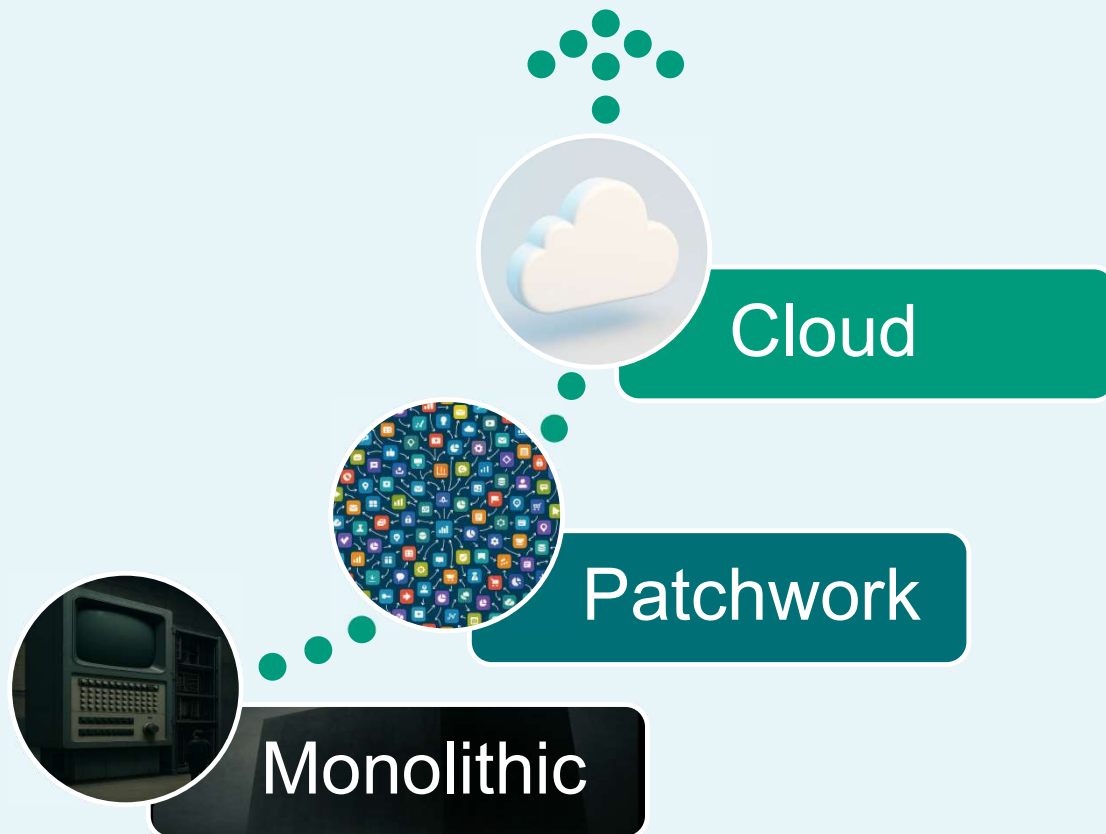


AI performance on a set of Ph.D.-level science questions



In every wave of innovation, businesses that moved too slowly or too recklessly got left behind. The winners? Those who made deliberate, strategic moves grounded in real use cases.

Decision sets have changed



You don't create a butterfly by pasting wings onto a caterpillar

- Your architecture matters more than your features.
- The real shift: from tools to Intelligence.
- The future is about intelligent advice infrastructure.
- The 'innovators dilemma'....



Don't Ask: What's the best {*INSERT ANY TOOL HERE*} ?

Do Ask: What's the right infrastructure to support advice delivery over the next 5 years?

Your biggest risk?

Deploying tech carelessly - automating what you should be protecting and overlooking what you should be amplifying.

Reimagine your business where every task falls into one of three categories:

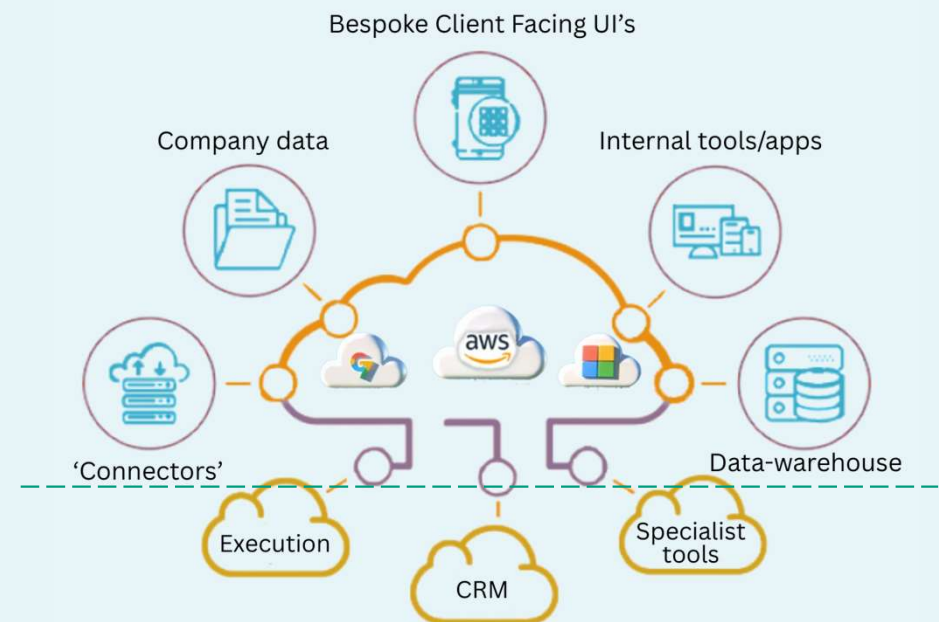
- What AI will replace – rules-based, repetitive, predictable work.
- What AI will augment – complex processes where human oversight still adds value.
- What AI *can't* replicate – and this is where advisers need to double down.



That final category? That's your strategic moat.

What “infrastructure-ready” looks like

- A secure, environment to centralise client and practice data, embed private/ customised AI & workflows without compromising on regulatory obligations or confidentiality
- Secure ‘connectors’ between your cloud environment and specialist tools.
- No-code tools to deliver bespoke client & staff experiences.



What “infrastructure-ready” really looks like

Australian Financial Planner Fac... TaskTrackerPro - Replit

chatgpt.com/c/687ef8d3-2250-8321-adb0-013bc1e8dda7

ChatGPT 4o

Share

Deliver me a prompt as a single document that i can use to upload to Replit as an initial prompt.

The aim of the prompt is to get replit to Create a fact-finding prototype that collects essential information from a client in a simple, intuitive, and engaging manner. The prototype should be a web-based form designed to gather key details (e.g., name, contact information, goals, preferences, or other relevant data) while adhering to best practice UX and design principles. Ensure the following:

User-Centered Design: Prioritize a clean, minimalist interface with clear instructions and a logical flow to guide the client through the process effortlessly. Use a single-column layout for simplicity and mobile responsiveness.

Accessibility: Incorporate accessibility best practices, such as high-contrast text (e.g., WCAG 2.1 compliant color ratios), clear font sizes (at least 16px), and keyboard-navigable inputs. Include descriptive labels and error messages for all form fields.

Visual Hierarchy: Use consistent typography, spacing, and color schemes to create a professional and approachable aesthetic. Implement subtle visual cues (e.g., button hover effects, progress indicators) to enhance usability.

Form Efficiency: Keep the form concise by asking only essential questions. Use appropriate input types (e.g., text fields, dropdowns, radio buttons) and provide placeholder text or tooltips to clarify expectations. Include validation to catch errors in real-time (e.g., invalid email formats) with friendly, actionable feedback.

Progress Feedback: If the form spans multiple steps, include a progress bar or step indicators to show clients how far they've progressed and what's left.

Responsive Design: Ensure the form is fully responsive, adapting seamlessly to desktop, tablet, and mobile devices for a consistent

Ask anything

Stop sharing

16°C Sunny

Search

ENG US

10:02 AM 23/07/2025

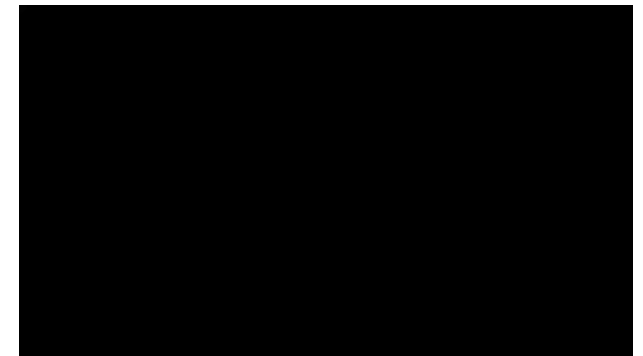
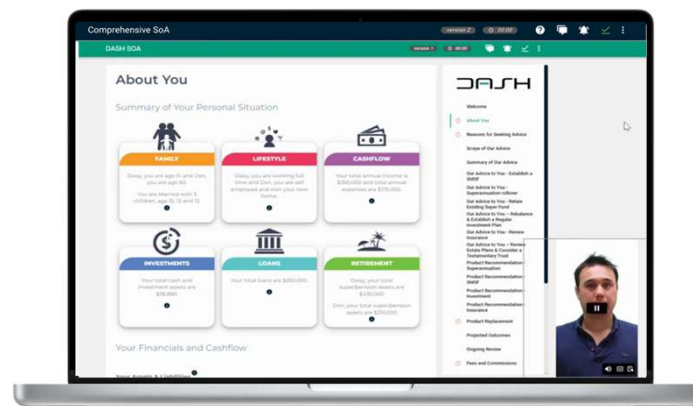
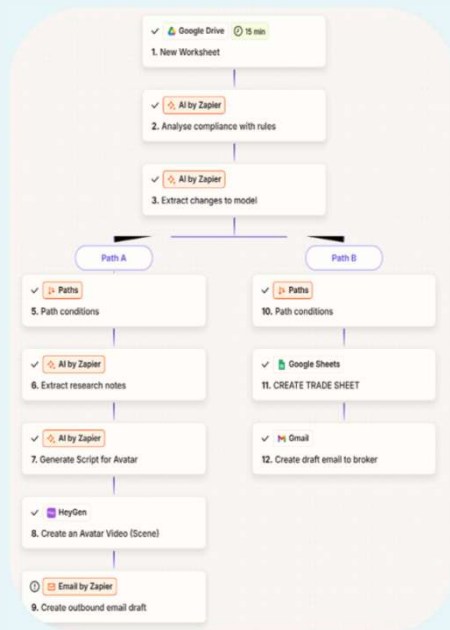
DASH

Converting foundations into function

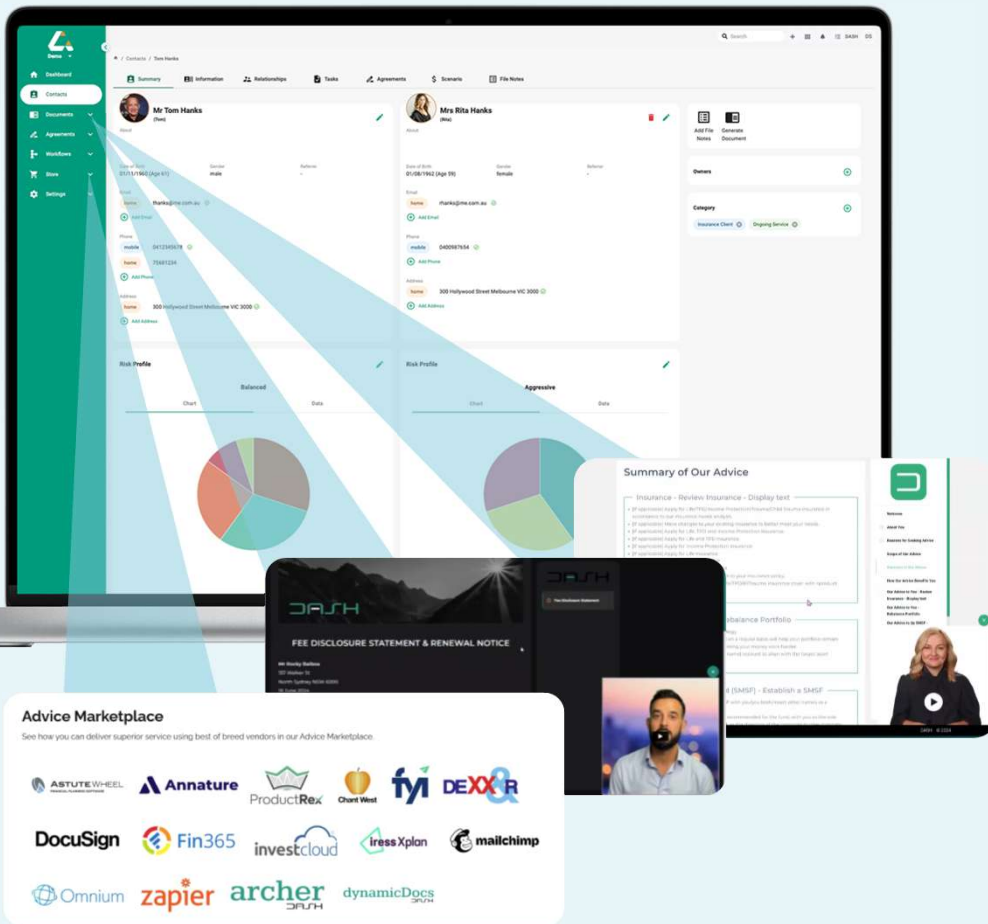
Advice delivery is being redefined.

The firms who win won't have the best tools – but they will have the best systems for orchestrating those tools.

- Custom environments are strategic asset.
- AI tooling moving faster than vertical software.
- Bespoke 'client experiences' can be developed by you and rolled out in days/weeks.



Enhancing advisor productivity...



74% of planners using AI - with file note creation and meeting documentation 86% of usage



Solo advisers have reported that AI notetaking tools save them between **five and eight hours per week**



Client onboarding time has been slashed from 3 hours and 45 minutes to **just 1 hour and 15 minutes**



Sentiment analysis in workflows **response rate** to high-priority emails increased from **75% to 90%** within practice KPIs



Client **conversion rates** have soared to **95%**, with clients expressing a strong preference for digital Statements of Advice (SOAs)



The average time to prepare an SOA/MDA agreement has been **reduced by 60%**

DASH



And in the end?

Emerging advice technology won't replace great advisers – but advisers who embrace it strategically will replace those who don't.

Use tech to automate what should be invisible, and double down on what only humans can do.