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THE AI ADVANTAGE

Bridging the AI Knowledge Gap in Financial Advisory

As an RIA, scaling client acquisition, enhancing engagement, and optimizing operations are key to staying competitive in today’s market.

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A recent survey revealed that 56% of financial advisors feel unprepared to integrate AI into their practice.

Source: https://www.zendesk.com/blog/ai-customer-service-statistics

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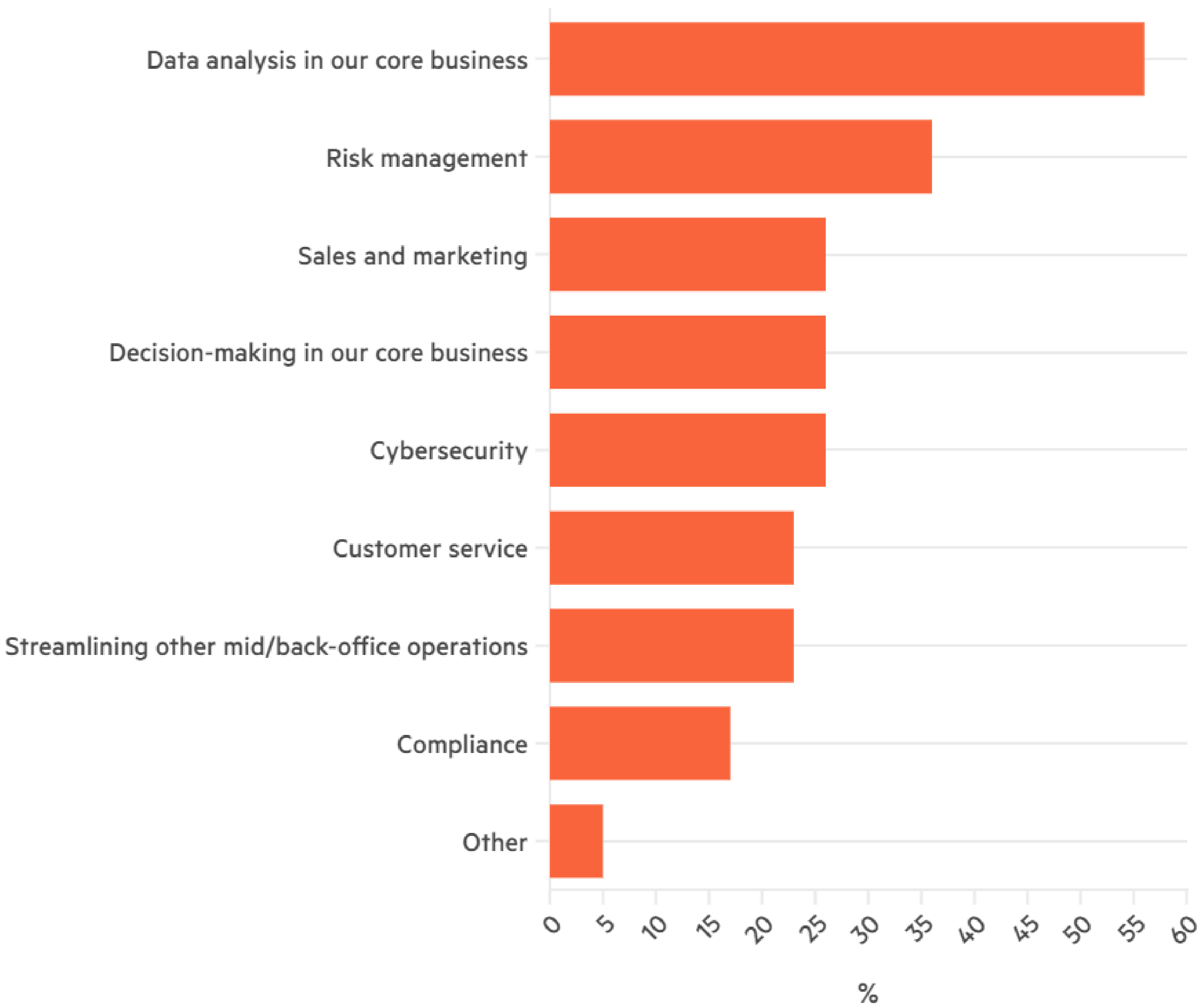
What business activities has your organisation been routinely applying AI and big data to?



Source: CFA Institute • Future State of the Investment Industry

Source: https://www.zendesk.com/blog/ai-customer-service-statistics

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Online resources for financial advisors interested in learning more about AI.

These resources offer valuable information tailored to advisors and can help them gain a better understanding of AI, its applications, and potential benefits for wealth management.

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WealthTech Today Podcast by Ezra Group

This podcast, hosted by Craig Iskowitz, dives into the latest trends in wealth management technology, including AI applications for financial advisors. Each episode provides insights from industry experts on how advisors can integrate technology to enhance their practices.

Source: https://wealthtechtoday.com/

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AI in Financial Services Podcast by FinTech Futures

This podcast explores how AI and machine learning are transforming the financial services industry, with episodes on AI use cases, compliance, and client engagement specifically for advisors and wealth managers.

Source: https://podcasts.apple.com/us/podcast/ai-in-financial-services-podcast/id1470990229

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The AI For Everyone Course by Andrew Ng on Coursera

This beginner-friendly course introduces AI concepts and practical applications without requiring technical knowledge. It's particularly beneficial for financial advisors who want a foundational understanding of AI and how it can impact business operations.

Source: https://www.coursera.org/learn/ai-for-everyone

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CFA Institute’s The Next Big Thing: The Age of Fintech, AI, and Big Data

The CFA Institute offers a collection of online learning modules covering topics like AI, machine learning, and data analytics for finance professionals. These modules are tailored for financial advisors looking to deepen their knowledge of AI applications in wealth management.

Source:https://rpc.cfainstitute.org/en/blogpage#q=3fddd98ba7fe87bbd8942528f0dc88827f037bd9430847c664c5e9a30111

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WealthManagement.com WealthStack Podcast

WealthStack, part of WealthManagement.com, focuses on the intersection of technology and wealth management. Episodes cover AI, automation, and how advisors can integrate these tools to grow their practices and improve client outcomes.

Source: https://www.wealthmanagement.com/wealthstack-podcast

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AI for Financial Advisors Webinar Series by XY Planning Network

This webinar series provides insights on AI and its impact on financial planning and client engagement, specifically for independent financial advisors. Advisors can learn how to leverage AI to streamline their practices and deliver value to clients.

Source: https://www.xyplanningnetwork.com

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DISCOVER HOW
AI CAN TRANSFORM YOUR RIA

The AI Platform that Systematizes Client Acquisition for Sustainable Growth

HTTP://WWW.VASTADVISOR.AI/RIA