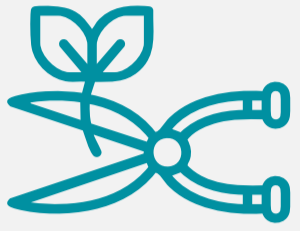


TOP 10 AI-Driven Insights in Q1 2025

Enterprise Financial Advisors

1

Resolve Underperforming Non-Managed Products



Assess High Fee Non-Managed Products

2

3

Track Non-Managed Cash Concentration



Flag Single Stock Concentration in Non-Managed Account

4

5

Evaluate Managed Account at a Loss



Investigate Client Withdrawing Significant Funds

6

7

Address Non-Managed Account with Small Cap Concentration



Monitor Client Depositing Significant Funds

8

9

Follow up on IRA Contributions



Alert for Underperforming Products

10

RIAs

1

Review Held Away High-Value Planning Account



Prepare Clients Retiring This Year

2

3

Update Client's Financial Plan



Generate New Financial Plan Report

4

5

Address Life Insurance Gap



Optimize Tax Loss Harvesting

6

7

Alert for Underperforming Products



Missing Health Care Goal

8

9

Monitor Underperforming Product in Held Away Financial Planning Account



Initiate Required Minimum Distribution

10