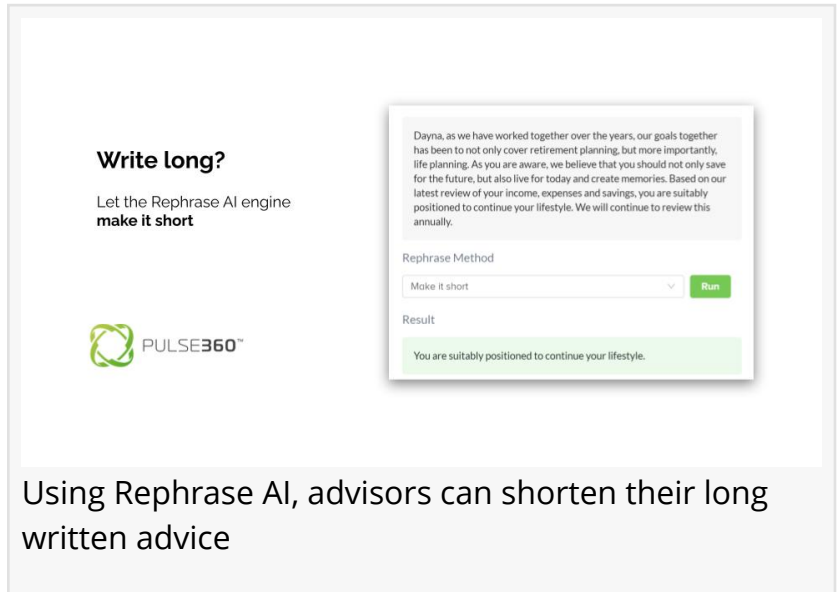


Pulse360 brings the latest Artificial Intelligence technology to help advisors communicate concisely and clearly.

Helping advisors' clients understand financial decisions.

RIVERSIDE, CA, UNITED STATES, September 29, 2022 / EINPresswire.com/ -- Pulse360 announced a major new feature release, [Rephrase](#). Pulse360's Rephrase is changing how financial advisors communicate with their clients by providing an easy-to-use interface for shortening or clarifying written advice.



Write long?
Let the Rephrase AI engine **make it short**

Dayna, as we have worked together over the years, our goals together has been to not only cover retirement planning, but more importantly, life planning. As you are aware, we believe that you should not only save for the future, but also live for today and create memories. Based on our latest review of your income, expenses and savings, you are suitably positioned to continue your lifestyle. We will continue to review this annually.

Rephrase Method
Make it short

Result
You are suitably positioned to continue your lifestyle.

PULSE360™

Using Rephrase AI, advisors can shorten their long written advice

“Client communication is a key pillar to enhance & retain client’s understanding of the financial decisions being made,” said Anand Sheth, Founder and CEO of Pulse360. “However, being concise is not easy. This leads financial advisors to end up writing novels that clients simply do not read. Not a win-win situation. Rephrase will help advisors be concise and clear with the help of the latest AI.”

“

I would have written a shorter email, but I didn't have the time! Have you heard that before? A common sarcasm on the fact that being concise is not easy, ”

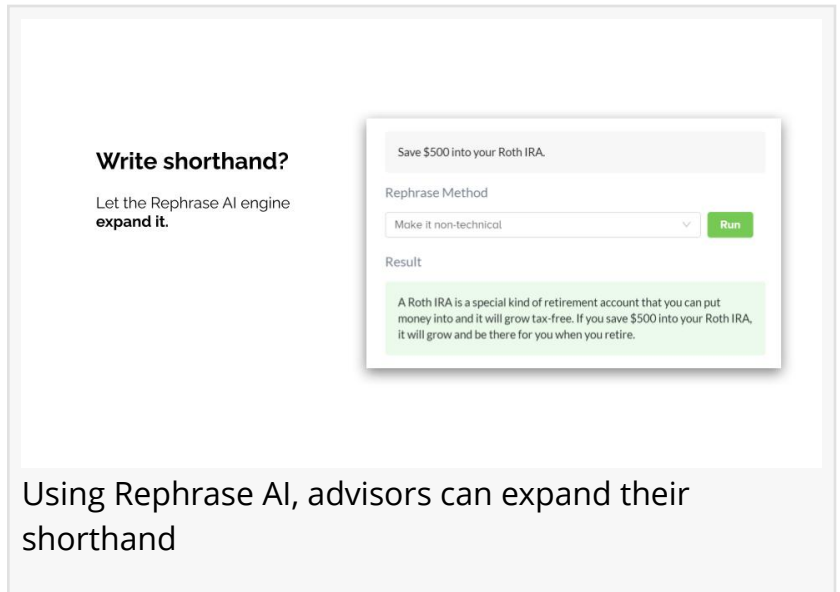
H. Adam Holt, CFP®, CEO of Asset-Map Holdings

Advisors often find themselves struggling to put their advice into words that clients will understand. This process can be time-consuming, difficult to scale, and results in novels being written by the advisor, or worse, they ignore writing entirely. With Rephrase, advisors can simply type their advice and have the AI suggest a shorter or clearer way to write the same. This allows advisors to focus on putting the main points across and let the AI formulate it in

a more digestible written communication. Advisors can now spend less time worrying about writing and more time advising their clients.

"I would have written a shorter email, but I didn't have the time! Have you heard that before? A common sarcasm on the fact that being concise is not easy," said H. Adam Holt, CFP®, CEO of Asset-Map Holdings. "Pulse360 has actually saved considerable time here with Rephrase."

Pulse360's Rephrase AI eases writer's block for Advisors. Anand said, "The question every advisor will be asking is, "Now that I have help from AI to write concisely and clearly, how many clients will thank us?"



Write shorthand?
Let the Rephrase AI engine expand it.

Save \$500 into your Roth IRA.

Rephrase Method
Make it non-technical

Result

A Roth IRA is a special kind of retirement account that you can put money into and it will grow tax-free. If you save \$500 into your Roth IRA, it will grow and be there for you when you retire.

Using Rephrase AI, advisors can expand their shorthand

Rephrase rewrote parts of this press release. To learn and ask questions about the new Rephrase, schedule a demo with Anand Sheth by visiting: <https://www.pulse360.com/schedule-press/>

About Pulse360

Pulse360, a 2021 Wealthmanagement.com Industry Awards Finalist, was created to make financial advisors at least 50% more productive. Our remote-ready SaaS suite can make every aspect of fiduciary meeting prep and documentation 10X more efficient. The Company was founded in 2019 by Anand Sheth and James Hill. The Company is headquartered in Riverside, CA. Tim Jenkins, a co-founder of SendGrid and former alumni of Techstars, is on the Board of Advisors.

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