

Arcus Partners Unveils Finity360 AI™

Revolutionizing the Wealth Management Middle Office with Integrated AI

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In today's fast-paced business environment, the pursuit of efficiency has never been more crucial. [Arcus Partners](#)™ proudly introduces Finity360

AI™, a groundbreaking solution that reshapes the middle office landscape by simplifying complex business processes through the integration of Artificial Intelligence (AI).



Solving the Wealth Management and RIA Industry's Omnipresent People, Process and Technology Challenges

Gerry Murphy, CEO of Arcus Partners, said: "At Arcus Partners <http://www.arcuspartners.com>, we

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Gerry Murphy

believe in driving innovation that transforms businesses. Finity360 AI™ is not just a solution; it's a leap forward in redefining how the Wealth Management middle office operates in the digital age. This is a significant milestone in our commitment to empowering businesses through cutting-edge technologies and continuous innovation.”

Key Features Redefining Wealth Management Middle Office Operations:

Seamless Integration: Finity360 AI™ seamlessly integrates with the Finity360™ suite (native Salesforce Apps) of middle office applications that include your documents, data, and workflows, effortlessly transforming the middle office into a more intelligent and efficient space.

Client Communication Analysis: Use Finity360 AI™ to analyze emails, notes, and messages related to client communication. Extract key information such as client preferences, financial goals, or specific investment requests.

Document Classification: Integrate Finity360 AI™ to classify and categorize documents within Salesforce based on their content. Automatically tag documents with relevant labels, such as "Financial Reports," "Investment Plans," or "Client Correspondence.”

Intelligent Search: Enhance your PaaS navigation capabilities using the Finity360 AI™ language model to provide Advisors with intelligent and context-aware search results including launching workflows for home office requests and account opening.

Automated Report Summaries: Leverage Finity360 AI™ to generate summaries of lengthy financial reports or documents. Attach these summaries to the original documents, providing a quick overview for wealth managers and clients.

Contextual Insights: Use Finity360 AI™ to analyze the context of client interactions and transactions. Generate insights on potential investment opportunities, risks, or changes in client sentiment.

Compliance Monitoring: Employ Finity360 AI™ to assist in monitoring client communications for compliance purposes. Identify and flag any language that may require further review or documentation.

Regulatory and Audit Requests: Use Finity360 AI™ to find documents or information based on natural language queries for #regulatory requests or audits.

Customizable Prompts: Finity360 AI™ comes with industry-standard prompts built-in with the flexibility for custom prompts, Finity360 AI™ optimizes efficiency to meet specific organizational needs.

Customizable Training Data: Highlight the module's flexibility in being trained on custom datasets, allowing users to tailor it to specific domains or industries.

Why Finity360 AI™?

- **Boost Productivity:** Automate time-consuming middle office tasks, allowing teams to focus on high-value activities driving business growth.
- **Reduce Training:** Minimize training efforts by using natural language, and simplifying business processes for Advisors, Operations, and Compliance.
- **Stay Compliant:** Ensure compliance with industry regulations and data protection standards, offering peace of mind in an ever-evolving regulatory landscape.
- **Future-Ready:** Arcus Partners™ is committed to continuous innovation. Finity360 AI™ evolves with businesses, adapting to emerging technologies and industry trends.

Join Us in Shaping the Future:

Elevate your middle office experience with Finity360 AI™ from Arcus Partners™ – where innovation meets efficiency. Embrace the future of intelligent middle office today.

#ArcusPartners #WealthManagement #DigitalTransformation #Finity360 #FinTech #AI

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About Arcus Partners:

Arcus Partners is a leading provider of innovative technology solutions and services to the financial industry, committed to empowering businesses through cutting-edge PaaS technologies and continuous innovation.

Trademark Information:

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