



Centrepont Alliance Demo Pack

April 2025



Filenote.ai

Who We Are

- Automation and AI Experts
- Specialise in Wealth Management
- Solutions Designed for Advisers
- 1,000+ Advisers using filenote.ai



PRODUCTIVITY

Freed up human resources for high value-added tasks.



CONSISTENCY

Identical processes, eliminates variations.



ACCURACY

The right result, decision or calculation the first time.



ROI

Identical processes, eliminates variations.



RELIABILITY

Freed up human resources for high value-added tasks.



AUDIT TRAIL

The right result, decision or calculation the first time.



SCALABILITY

Identical processes, eliminates variations.



RETENTION

Freed up human resources for high value-added tasks.



RIGHT-SHORING

The right result, decision or calculation the first time.



The Problem

Creating file notes is necessary but is time-intensive.



WHAT WOULD YOU DO WITH AN EXTRA 28 DAYS PER ADVISER PER YEAR?



The Solution: Filenote.ai

Designed for Australian wealth management firms

Artefacts
generated for all
meetings

File Note

CPAL Approved Templates

FILE NOTE	
Client Name	
Meeting Date	
Meeting Time	
Meeting Location	
Meeting Type	
Meeting Agenda	
Meeting Notes	
Meeting Outcome	
Meeting Action Items	
Meeting Follow Up	

- Review
- Discovery
- SoA Presentation
- Strategy
- Ad Hoc
- Fund Manager
- Board Meeting

Client Summary Email

Close the Loop Quickly

Dear [Client Name],

Thank you for your meeting on [Date] to discuss [Topic]. I have reviewed the information you provided and have prepared a summary of the key points discussed during the meeting.

Key points from our discussion:

- 1. The client expressed a strong interest in the proposed investment strategy, particularly the focus on sustainable and ethical investments.
- 2. The client requested a detailed analysis of the proposed investment strategy, including a breakdown of the expected returns and risks.
- 3. The client agreed to provide the necessary documentation to proceed with the investment process.
- 4. The client requested a meeting with the investment team to discuss the proposed investment strategy in more detail.
- 5. The client agreed to provide the necessary documentation to proceed with the investment process.

Action items:

- 1. The client to provide the necessary documentation to proceed with the investment process.
- 2. The client to provide the necessary documentation to proceed with the investment process.
- 3. The client to provide the necessary documentation to proceed with the investment process.

Next steps:

- 1. The client to provide the necessary documentation to proceed with the investment process.
- 2. The client to provide the necessary documentation to proceed with the investment process.
- 3. The client to provide the necessary documentation to proceed with the investment process.

Yours faithfully,

[Signature]

Meeting Transcript

Recap and Full Transcript

Transcript Recap

Client's Proposed Goals and Objectives (00:00:00-00:00:05)

- 1. The client expressed a strong interest in the proposed investment strategy, particularly the focus on sustainable and ethical investments.
- 2. The client requested a detailed analysis of the proposed investment strategy, including a breakdown of the expected returns and risks.
- 3. The client agreed to provide the necessary documentation to proceed with the investment process.

Investment Strategy and Performance (00:00:05-00:00:10)

- 1. The client expressed a strong interest in the proposed investment strategy, particularly the focus on sustainable and ethical investments.
- 2. The client requested a detailed analysis of the proposed investment strategy, including a breakdown of the expected returns and risks.
- 3. The client agreed to provide the necessary documentation to proceed with the investment process.

Investment and Fee Summary (00:00:10-00:00:15)

- 1. The client expressed a strong interest in the proposed investment strategy, particularly the focus on sustainable and ethical investments.
- 2. The client requested a detailed analysis of the proposed investment strategy, including a breakdown of the expected returns and risks.
- 3. The client agreed to provide the necessary documentation to proceed with the investment process.

Client's Proposed Goals and Objectives (00:00:15-00:00:20)

- 1. The client expressed a strong interest in the proposed investment strategy, particularly the focus on sustainable and ethical investments.
- 2. The client requested a detailed analysis of the proposed investment strategy, including a breakdown of the expected returns and risks.
- 3. The client agreed to provide the necessary documentation to proceed with the investment process.

Investment Strategy and Performance (00:00:20-00:00:25)

- 1. The client expressed a strong interest in the proposed investment strategy, particularly the focus on sustainable and ethical investments.
- 2. The client requested a detailed analysis of the proposed investment strategy, including a breakdown of the expected returns and risks.
- 3. The client agreed to provide the necessary documentation to proceed with the investment process.

Investment and Fee Summary (00:00:25-00:00:30)

- 1. The client expressed a strong interest in the proposed investment strategy, particularly the focus on sustainable and ethical investments.
- 2. The client requested a detailed analysis of the proposed investment strategy, including a breakdown of the expected returns and risks.
- 3. The client agreed to provide the necessary documentation to proceed with the investment process.

Client's Proposed Goals and Objectives (00:00:30-00:00:35)

- 1. The client expressed a strong interest in the proposed investment strategy, particularly the focus on sustainable and ethical investments.
- 2. The client requested a detailed analysis of the proposed investment strategy, including a breakdown of the expected returns and risks.
- 3. The client agreed to provide the necessary documentation to proceed with the investment process.

Investment Strategy and Performance (00:00:35-00:00:40)

- 1. The client expressed a strong interest in the proposed investment strategy, particularly the focus on sustainable and ethical investments.
- 2. The client requested a detailed analysis of the proposed investment strategy, including a breakdown of the expected returns and risks.
- 3. The client agreed to provide the necessary documentation to proceed with the investment process.

Investment and Fee Summary (00:00:40-00:00:45)

- 1. The client expressed a strong interest in the proposed investment strategy, particularly the focus on sustainable and ethical investments.
- 2. The client requested a detailed analysis of the proposed investment strategy, including a breakdown of the expected returns and risks.
- 3. The client agreed to provide the necessary documentation to proceed with the investment process.

Client's Proposed Goals and Objectives (00:00:45-00:00:50)

- 1. The client expressed a strong interest in the proposed investment strategy, particularly the focus on sustainable and ethical investments.
- 2. The client requested a detailed analysis of the proposed investment strategy, including a breakdown of the expected returns and risks.
- 3. The client agreed to provide the necessary documentation to proceed with the investment process.

Investment Strategy and Performance (00:00:50-00:00:55)

- 1. The client expressed a strong interest in the proposed investment strategy, particularly the focus on sustainable and ethical investments.
- 2. The client requested a detailed analysis of the proposed investment strategy, including a breakdown of the expected returns and risks.
- 3. The client agreed to provide the necessary documentation to proceed with the investment process.

Investment and Fee Summary (00:00:55-00:01:00)

- 1. The client expressed a strong interest in the proposed investment strategy, particularly the focus on sustainable and ethical investments.
- 2. The client requested a detailed analysis of the proposed investment strategy, including a breakdown of the expected returns and risks.
- 3. The client agreed to provide the necessary documentation to proceed with the investment process.

Notes to Paraplanner

Generated for Strategy Meetings

NOTES TO PARAPLANNER	
Client Name	
Meeting Date	
Meeting Time	
Meeting Location	
Meeting Type	
Meeting Agenda	
Meeting Notes	
Meeting Outcome	
Meeting Action Items	
Meeting Follow Up	

Letter of Engagement

Generated for New Client Meetings

Dear [Client Name],

Thank you for your meeting on [Date] to discuss [Topic]. I have reviewed the information you provided and have prepared a summary of the key points discussed during the meeting.

Key points from our discussion:

- 1. The client expressed a strong interest in the proposed investment strategy, particularly the focus on sustainable and ethical investments.
- 2. The client requested a detailed analysis of the proposed investment strategy, including a breakdown of the expected returns and risks.
- 3. The client agreed to provide the necessary documentation to proceed with the investment process.

Action items:

- 1. The client to provide the necessary documentation to proceed with the investment process.
- 2. The client to provide the necessary documentation to proceed with the investment process.
- 3. The client to provide the necessary documentation to proceed with the investment process.

Next steps:

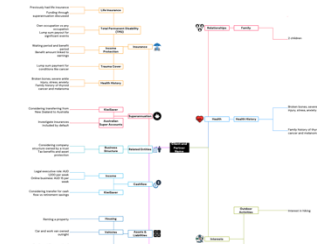
- 1. The client to provide the necessary documentation to proceed with the investment process.
- 2. The client to provide the necessary documentation to proceed with the investment process.
- 3. The client to provide the necessary documentation to proceed with the investment process.

Yours faithfully,

[Signature]

Client Mind Map

Generated for New Client Meetings



Filenote.ai In 3 Simple Steps.

Unlock Productivity, Consistency, And Compliance.



How to Trigger the Correct AI Generated Artefacts

When creating your meeting name in Zoom or Teams, simply include one of the following key words in the meeting name to automatically trigger your desired artefacts:

- **Review Template** (Default): no specific key words required to trigger this template
- **Discovery Template, Letter of Engagement (if opted in) & Client Mind Map (if opted in)**: Initial; Discovery; Discover; First; Fact Find
- **Strategy Template & Notes to Paraplanner (if opted in)**: Strategy
- **SoA Presentation Template**: Present; Presentation; Statement of Advice; SoA
- **Fund Manager Template**: Fund Mgr; Fund Manager
- **Management & Board Meeting Template**: Board; Management; Mgmt
- **Ad Hoc Template**: Ad Hoc

Notes:

- These key words can be configured to suit your needs

Pricing Plans (\$AUD)

CPAL Extras

- CPAL approved templates
- 20% extra hours on standard plan
- Conference offer until May 2025: 15% discount for the first 4 months after signing up (new users)

21 DAY FREE
TRIAL

STANDARD

\$139

/ user / month

Inclusions

- **20 hours** recording limit/user/mth

Key Features

- File note (CPAL approved templates for different for meeting types)
- Client email draft
- Ability to tailor output to your needs
- Full meeting transcript
- Platforms: Teams, Zoom, in-person

New Features

- Automated notes to paraplanner
- Automated CPAL letters of engagement
- Automated client mind maps

PRO

\$249

/ user / month

Inclusions

- **Unlimited** recording limit/user/mth

Everything in Starter, Plus

- Unlimited hours!

ENTERPRISE

CONTACT SALES

10+ Advisers

Inclusions

- Discounted volume pricing
- Fully custom templates (BYO)
- Early access to new features

Terms:

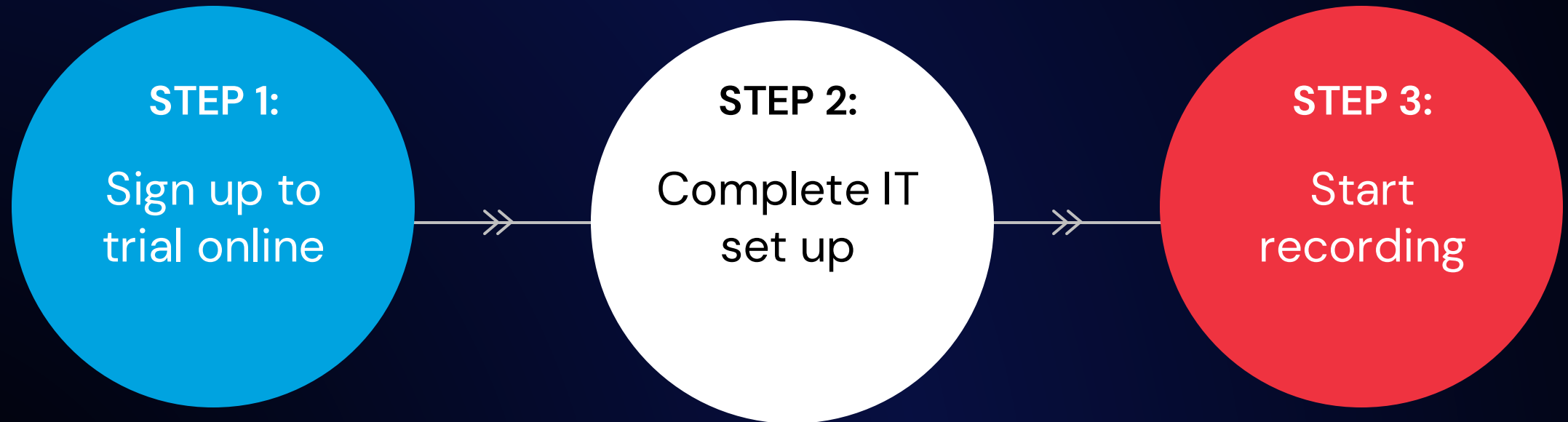
- Minimum 12 month commit

NO LOCK IN CONTRACTS | HOURS AGGREGATED AT A FIRM LEVEL | ROLLOVER HOURS & 5% DISCOUNT ON ANNUAL PLAN



Getting Started

Start recording your meetings and you are ready to go!





Appendix

The Benefits: Filenote.ai

- » **Time savings:** on average, 30–60 minutes per client meeting
- » **Consistency:** reduces variation in output across advisers
- » **Coaching tool:** ability to identify gaps in advice given
- » **High quality output:** we use and orchestrate the best AI models
- » **Compliance friendly:** we can tailor the templates to suit your needs



What makes filenote.ai different



- » **Designed for advisers:** Filenote.ai recognizes adviser terminology and tailors the output to the needs of an adviser
- » **High quality output:** We use the best AI, orchestrating 6 different models, to ensure the highest quality of output
- » **Custom templates:** We can tailor our templates to suit your firm's compliance and business needs
- » **Easy to implement:** The adviser simply needs to press 'Record' and the output is sent to them automatically
- » **No data storage:** We do not store or retain your client data or recordings, giving you complete control



Filenote.ai Customisation Options

- » **Tailored categories:** Add / change / remove categories in standard templates
- » **Hard Coded Text:** Add hard coded text to every file note generated
- » **Branded:** Add your logos, font and style
- » **CC Option:** Copy other people on every file note generated (e.g. support staff)
- » **Writing Style:** File notes can be written in first person or third person



Tips & Tricks

- » Dictate additional information post meeting to add depth to file note
- » Can be helpful to recap conversations if there is a lot of back and forth
- » Ability to upload audio files directly into Teams (e.g. mp3, wav, m4a, mp4)
- » Record voice memo on phone if you are unable to use Teams
- » Options for handling phone calls: upload recording, use speaker, dictate after



Teams App

Record In-Person Meeting

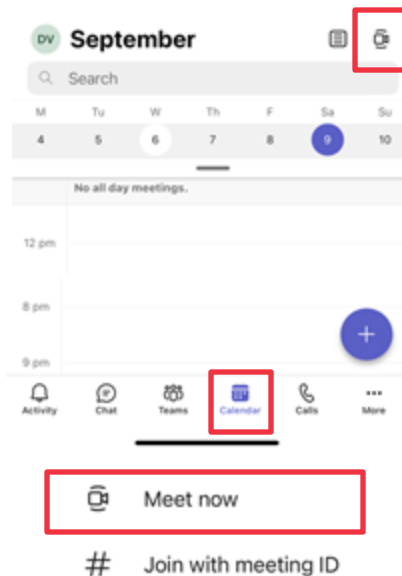
STEP 1:

Log on to Teams App on Phone.



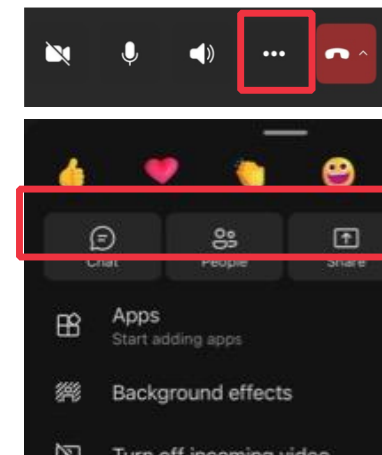
STEP 2:

Select 'Meet Now' to create new meeting.



STEP 3:

Click 3 dots and select 'Start Recording'.



Note – make sure you are not muted and keep the phone open



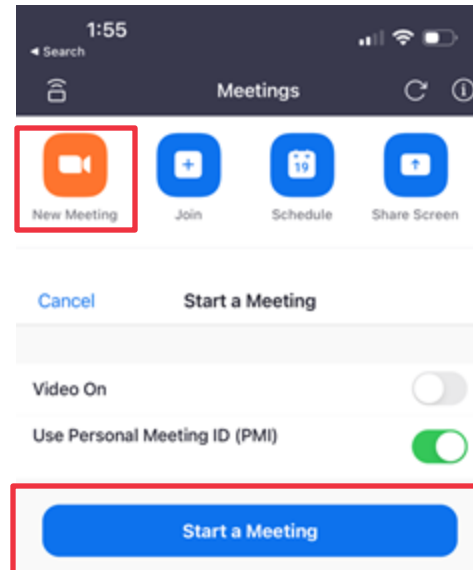
Zoom App

Record In-Person Meeting

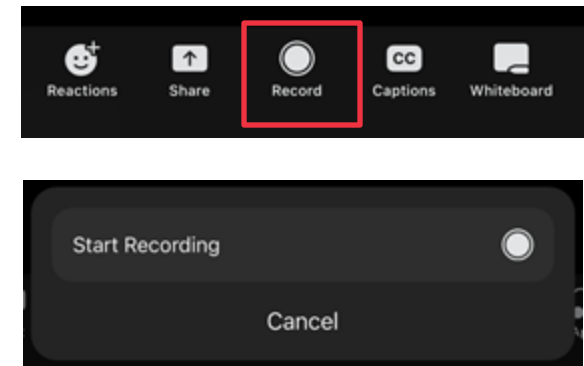
STEP 1:
Log on to Zoom App
on Phone.



STEP 2:
Select 'New Meeting' to
Start a Meeting.



STEP 3:
Click 'Record' and select 'Start
Recording'.



Note – make sure you are not
muted and keep the phone open



Data Security and Privacy FAQs

What does my IT need to do?

We will provide your IT admin with a Microsoft App Registration. Admin Consent link that will grant filenote.ai the necessary permission. for the solution to function. Your IT will need to agree to deploy the App Registration on behalf of the tenant using the Microsoft link.

What happens to the video recording?

No video is downloaded or kept by us. Our solution uses the Microsoft App Registration to create a temporary access link (valid for 60 min) to your recording for transcription purposes.

Where are your servers based?

Our control room infrastructure is by default based in EU to ensure strict compliance to GDPR is met. We spin up runtime locally at no extra cost to our clients. In particular, run time is spun up in Australia for Australian and non-US clients, US run time for US clients. We use on demand containers to host runtime environments and they are destroyed at the completion of each run.

What is the app registration?

As a Microsoft Partner, Microsoft has given us the ability to deploy our filenote.ai via a multi-tenant Microsoft App Registration into your Microsoft tenant. App Registration specifies the level of access required and consent must be given by your tenant admin.

What level of access is required?

Filenote.ai strives to request the minimum level of access for the solution to function. In particular, the solution requests access to poll your chat in Teams to identify meetings (without access to calendar or email) and permission to create a temporary link of your recording as it displays in Teams.

How are you securing the environment?

The underlying infrastructures of filenote.ai are SOC2 Type II and GDPR compliant. Integration points and the overall architecture are designed by a certified GIAC penetration testing specialist. The environment is designed to not retain data post processing except log-data for debugging and billing verification purposes.

Data Security and Privacy FAQs

What does my IT need to do?

We will request your IT admin to provide a Zoom Serve-to-Server OAuth that will grant filenote.ai the necessary permission for the solution to function.

What happens to the video recording?

No video is downloaded or kept by us. Our solution uses the Zoom Serve-to-Server OAuth to access your recording for transcription purposes.

Where are your servers based?

Our control room infrastructure is by default based in EU to ensure strict compliance to GDPR is met. We spin up runtime locally at no extra cost to our clients. In particular, run time is spun up in Australia for Australian and non-US clients, US run time for US clients. We use on demand containers to host runtime environments and they are destroyed at the completion of each run.

What is Zoom Server-to-Server OAuth?

Zoom Server-to-Server OAuth is the preferred system to system level integration approach. Filenote.ai uses this approach to request the correct level of permission and retrieve the access link for recording without needing to download the video.

What level of access is required?

Filenote.ai strives to request the minimum level of access for the solution to function. In particular, the solution requests access to poll your meeting in Zoom to identify meetings recorded for the named user.

How are you securing the environment?

The underlying infrastructures of filenote.ai are SOC2 Type II and GDPR compliant. Integration points and the overall architecture are designed by a certified GIAC penetration testing specialist. The environment is designed to not retain data post processing except log-data for debugging and billing verification purposes.



Ready to get started? Let's go.

Sign Up to 21 Day Free Trial: <https://www.filenote.ai/pricing>

Schedule Demo: <https://www.filenote.ai/book-a-demo>

Contact Us: hello@blvsolutions.com

