

Centrepoint Alliance Demo Pack

April 2025



Filenote.ai

Who We Are

- Automation and Al 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.



ROI

Identical processes, eliminates variations.



CONSISTENCY

Identical processes,

eliminates variations.

RELIABILITY

Freed up human resources for high value-added tasks.



ACCURACY

The right result, decision or calculation the first time.



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.

30
Minutes per Meeting

X

Meetings per Week

Avg # of meetings / week / adviser

Avg # of meetings / week / adviser

Copportunity to save per adviser / month

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



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

Client Summary Email

Close the Loop Quickly

	Dear)	Clerify Name)		
	Doge	this message finds you well. I wanted to follow up on our recent discussions and autiline the		
	mod st	reps for both of us to progress towards your financial goals.		
	Ser pe	Key points from our disposion:		
		We have discussed an investment option suitable for nethers, which offers approximately STA maximum and is described as very stable.		
		I have afocuted LTK of your retired father's portfolio to this investment due to its secure income.		
		We have noted the errorg performance of infrastructure investments in your portfolio, expectable in a high inflation energoissem.		
		Your superiormation has outperformed the overage with an 33.4% return up until Secondary.		
		We have also discussed the tax benefits of contributing to superameation, with an immediate EPA return on investment.		
		It's important to note that your living expenses are at \$45,000 per year.		
		Now have a time day trip to thetram planned for (locamber and are considering a)-week trip to tarly need pear.		
	Action themse for your			
		Make a super contribution using the SPEY details I will provide.		
		Keep me informed ence the contribution is made.		
		Sind he the most neart popula.		
		Call the bank to find out the interest rate being received on the seeings account.		
	Artis	States for one		
		I will send you an email with the BMY details for making a super-contribution.		
		Once the contribution is made, I will lodge the tax electrofible contribution form with the super fund.		
		I will send you a confirmation of the ludged force for tax purposes.		
		I will update the cash flow modeling for you and sond it via email.		
	As plus year to	s always, it is a pleasure to assist pay with plus financial planning. Please feel find to reach out on flave any questions or need further identification on one of the points above.		
	Marie	Marin regards,		
[Your Marrie]		Matte]		

Meeting Transcript

Recap and Full Transcript

Cliant's Financial Goals and Objectives (0:00:00-0:05:00) • The Brook/Burdy area to example a controllée troone for long-tone goals, recluding traveling to New York.	Full Transcript
 That section on the auditerastics or recovation needs for their 70-year-old bruse. Purfishs returned about 625% this year, sligning with their balanced investor profile. 	Speaker I (EOEOE - 6:00.05) Wilcome, jobs and Jame It's great to see but for our second context. How have you been?
Investinant Strategy and Performance (0.03.00-0.06): Confineston of a Subscord Investment strategy with a 10% allocation to cash and	Speaker 2 (8:00:05 - 0:00:26) Thants, Richard, Write been well, faciled to partition has been shing and discuss our plans.
Confirmation of a behavior transferred strategy with a 10% allocation in costs and defensive assets, and 20% is growth assets. Perificial performance was sold, relucining about 6.25%.	Speaker 3 (600.16-0.00.15) Too, and we have some new gods we'd like today.
Retirement and Yes Planning to 06:00-09:001	Speaker 1 (8:00 15: 0:00 20) Absolutely, lot's directo, first, your partials about 5 (27)- this your, aligning with your balanced inventor profile.
John's representation transfer belongs to under \$400,000 (see's a \$54,000. A resolvent strongs for the report to neingare potential too liabilities was negative.	Speaker 2 (6:00:26-0:00:25) That's manusting, What about our reperson belonger?
	[Trainstript continues with key sections as exclosed in the recap]
Cashfirm Needs and Living Expenses (0.09:00-0.12.00)	Speaker 2 (B.1800 - 8.1845) Third yes, Richard We appreciate year gol
Meastly cash flow reprises an of \$2.000, the see additional \$1.000 flows to \$V.6. Importance of cashing \$6.000 flow for the consequence flow instead of Classet flows as \$60, persons, which still increase when they was \$60.000 personable Destinations of personal properties, verying the density is developed for covered anneaes. Between 5 hand accurate and warm deposits, with an approximage urers deposit of \$1250 personation for the second control of the se	Speaker 1 (R.1565 - 0.8550) by pleases, let's set a data for nor need as voices the performance of three strangers and datase any adjustments.
Estate Planning Considerations (0.12-00-0.15-00)	
 The Brooklyn' intention to put their her housen're their children's names discussed, considering too and information lates. 	
Mentioned the challenges in the current market for children trying to enter the bousing	

New features -Inclusive on all filenote.ai plans

Notes to Paraplanner

Generated for Strategy Meetings



Letter of Engagement

Generated for New Client Meetings



Client Mind Map

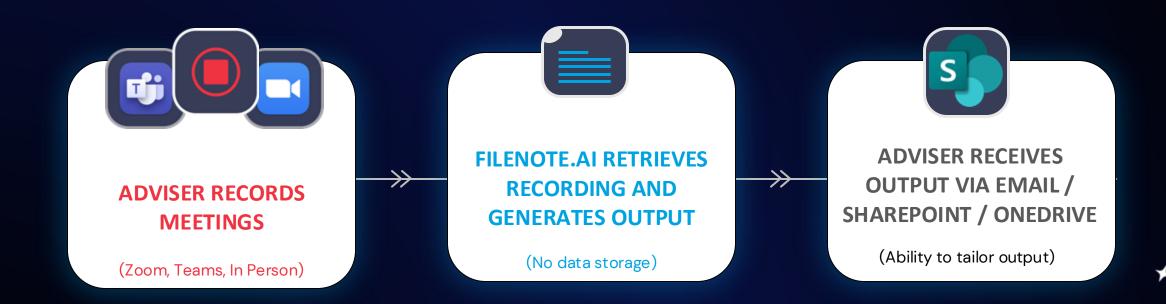
Generated for New Client Meetings





Filenote.ai In 3 Simple Steps.

Unlock Productivity, Consistency, And Compliance.







How to Trigger the Correct Al 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 FRFF **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





Getting Started

Start recording your meetings and you are ready to go!







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 or the best Al 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 Al, 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

X

- 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

X

- 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

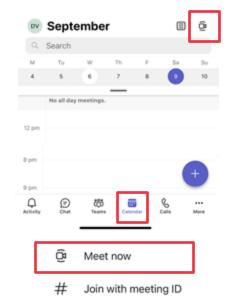
STEP 1:

Log on to Teams App on Phone.



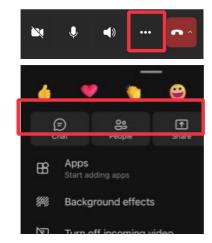
STEP 2: Select 'Meet Now' to

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

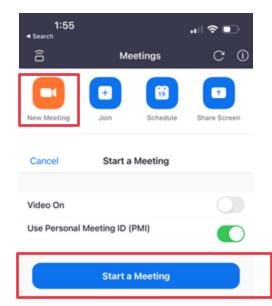
STEP 1:

Log on to Zoom App on Phone.



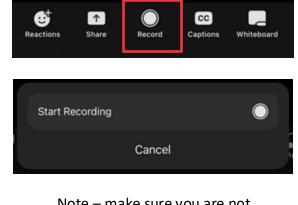
STEP 2:

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





Microsoft Teams User Guide

Data Security and Privacy FAQs



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.





Zoom User Guide

Data Security and Privacy FAQs



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



