

Harnessing AI for Growth Webinar Series

AI Won't Replace Financial Advisors,
but advisors who adopt AI will outperform those who don't

Session 1



Interacting with an AI Chatbot

Mastering Prompts for Financial Advisors

How to communicate clearly with AI so it becomes a reliable thinking partner

- ✓ Foundation of prompting
- ✓ Asking better questions
- ✓ Getting AI to write in your voice
- ✓ Drafting emails, letters, scripts, and client explanations

Session 2



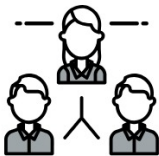
AI Meeting Notes & Summaries

Turn Hours of Admin into Minutes

Use AI to clean up and structure your:

- ✓ Client meeting notes
- ✓ CRM summaries
- ✓ Agendas and follow-ups
- ✓ Prep questions and action items
- ✓ Team communication

Session 3



Use AI in Microsoft 365

Supercharge Outlook, Word, Excel & PowerPoint

Practical workflows you can use immediately

- ✓ Summarize long email threads
- ✓ Draft client letters and documents
- ✓ Analyze spreadsheets and uncover insights
- ✓ Build branded slide decks in minutes



Integrate AI into Your Daily Routine

If you've been curious about AI but unsure where to start, this is your starting point.

To learn more, talk to your First Trust Wholesaler