

# LatentBridge and David Technology

## Best AI-Based Wealth Advisory Platform 2021

LatentBridge is a global intelligent automation firm with an industry-leading SaaS platform and proprietary automation accelerators. It provides automation advisory, implementation, and managed services.

David Technology is a London-based fintech that has an AI-based financial advice platform to help advisers scale and become more profitable.

Together, they have developed DAVID, otherwise known as Connected Adviser Platform, where LatentBridge is the exclusive technology partner to develop the platform, leveraging AI and ML technologies, based on their track record and expertise in the financial services sector. David Technology brings a deep understanding of the subtle nuances within the wealth advisory business.

DAVID is an AI-based front to back SaaS platform for financial advisers. This platform is a unique blend of an interactive, intelligent tool and human overlay to supercharge financial advice businesses.

Developed for financial advisory firms by expert financial advisers and intelligent automation specialists, this ready-to-use product optimises costs, saves time, increases business value, and reduces risk. The platform features intelligent CRM, digital onboarding, perceptive client insights, smart advice, digital compliance, and reporting system.

With the largest inter-generational wealth transfer underway, the new-age digitally savvy, fast-paced customers seek immediate, personalised, and appropriate advice at their fingertips. With the Connected Adviser Platform, financial advice businesses and advisers are better equipped to serve their clients with speed and scale. It is made nimble to adapt to the customer environment, regulatory and financial services industry, and updates in technology.

Understanding customers and their needs with an aim to provide excellent end-to-end client experience are key in this traditionally manual and highly personalised wealth management industry. The platform helps advisers spend more time with their customers and deliver an enriching experience by intelligently automating the manually intensive workflow.

Being active financial advisers in an award-winning business, the founders of David Technology are at the forefront of the challenges faced by financial advice businesses. LatentBridge's purpose is to make intelligent automation accessible to every



enterprise. To make that a reality, the team creates simple, innovative and relevant solutions that bring AI, robotics, machine learning and NLP together in a cohesive and beneficial manner. It constantly evaluates latest technologies in the market to ensure it brings the best of breed tools to its clients.

LatentBridge provides intelligent automation products for capital markets post trade services, loan authorisation and credit assessment automation for retail banking industry, and financial crime and surveillance under compliance for financial services firms, amongst its many solutions.

The Connected Adviser Platform empowers the adviser with its AI-driven hybrid model of advice delivery, where the adviser retains control and oversight to deliver best outcomes at all times. Adoption of the platform allows traditional IFAs to upgrade their abilities to handle more clients for less, and consequently, enhance their firm valuations. It is a game-changer for the industry. It reduces an adviser's manual efforts by 70% and increases their capacity to handle customers by three times.

With a ready client base, the footprint of the platform is accelerating across all advisory sector, asset managers and wealth managers. LatentBridge and David Technology are working closely with a global platform to integrate this tool with its infrastructure. They are also in conversation with other wealth management firms who are looking to increase clients per adviser whilst retaining excellent personalised services.

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