1-TO-1 AI COACHING FOR WEALTH LEADERS

Your clients. Your advice. A practical *AI plan.*

A private leadership lesson on what AI means for wealth and financial planning firms: adviser workload, client trust, scams, suitability support, and how to use AI without weakening compliance.

SECTOR ISSUES

- **Advice admin is heavy** - prep, notes, reviews and suitability work take time from clients.
- **Trust is under pressure** - scams, deepfakes and generic finance content make clients wary.
- **Consolidation changes service** - firms need consistency without losing the personal relationship.

IN YOUR 1-TO-1 LESSON

- **Map adviser workflows** - meeting briefs, client letters, review prep and research summaries.
- **Practise accountability** - AI supports drafting and sensemaking, not recommendations.
- **Leave with a firm AI vision** - where AI saves time, where data stays protected and where judgement sits.

> **This is coaching, not a tool demo.** The lesson works through your client experience, adviser workload and compliance boundaries, then turns that into a practical action plan.

A coached route from workload to better advice

AI can help prepare, summarise and draft, but the advice, suitability call and trust still come from the adviser. The lesson coaches you through how the firm uses AI without blurring that line.

Taught and advised leaders at **Google**, **Microsoft**, **SAP**, **Adobe** and **Vodafone**. Writing on AI in **Fast Company** and **The Guardian**.

Book 1-to-1 AI coaching

Email us directly hello@goodtransformer.ai