

# KAI Investment Management

Driving Investment Relationships  
Through Digital Experiences

“66% of children fire their parents’ financial adviser after they inherit their parents’ wealth.”

— Boston Consulting Group

## Meet KIM

Built with the most advanced Conversational AI technology in the financial services industry, KIM provides the next level of digitally-engaging experiences that resonate & excite tech-savvy banking customers.

KIM’s virtual assistant gets to know your customers, learns their goals, life plans, & what’s really important to them financially.

KIM provides answers & insights, quickly responding to banking questions & helping to guide your customers’ financial journey, well-being & needs - intelligently, anytime, anywhere.

**The investment management industry is preparing for the greatest transfer of wealth in modern history.**

Baby boomers are beginning to enter retirement and millennials are set to inherit \$50+ trillion over the next decade. This shift in generational wealth will bring big changes in how wealth managers will engage with their clients, gone will be the days of review meetings, phone calls and dinners- they will be replaced by portals, alerts, text messages and web chats. Wealth managers must build the digital experience and strategy that will resonate with their new client demographic.

**KIM cares about your customers, continually thinking about their financial journey.**

How much do I have?

**K** You have \$91,937.07 and owe \$22,719

Sure

**K** You have:  
\$4,820.96 in your KAI Banking Checking Account (2452)  
\$11,576.11 in your KAI Bank Savings Account (7256)  
\$75,000 in your KAI Bank Investment Account (8000)

You owe:  
\$13,765 on your KAI Bank Credit Card Account (1645)  
\$8,954 on your KAI Bank Corporate Credit Card (6190)

Give me a tip Teach me a term Overview of Portfolio Add

**KIM educates your customers, providing them insights into their financial well-being.**

What are commodities?

**K** Commodities, or products used for commerce like agricultural products and natural resources, are traded on a separate, authorized commodities platform.

How am I doing?

**K** Hmm, let's see...  
Your initial investment of \$60,000 has grown at 25% per anum. Your current available balance on your investment account ending in ...8000 is \$75,000

I noticed you were recently asking about commodities? Would you like to learn more about our commodities offering?

Sure

**KIM tracks goals & keeps your customers in the know, across their accounts, portfolios, & investments.**

What's an IRA?

**K** An individual retirement account (IRA) is an investing tool through which people can save for their retirement. Depending on the type of IRA and the taxpayer's income, contributions to such a fund may be tax-deductible.

How am I doing?

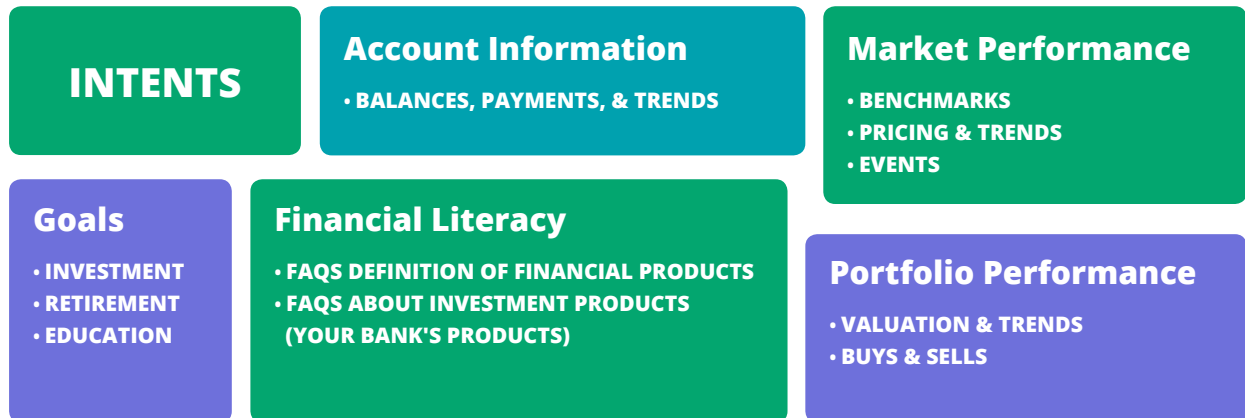
**K** Hmm, let's see...  
Your initial investment of \$60,000 has grown at 25% per anum. Your current available balance on your investment account ending in ...8000 is \$75,000

I noticed you were recently asking about IRA? Would you like to learn more about our retirement products?

Yes No

# Pre-packaged Banking Knowledge Speeds Time to Market

On day one, KAI is fluent in banking.



This deep financial expertise provides quicker deployments & eliminates the need for costly ramp-up time & training. KAI can track the conversation's goals & intents to do more for your customers. KAI is designed to be intent-based & handle context tracking & switching.

## Who's Choosing KAI



J.P.Morgan



Manulife Bank



## About Kasisto

Founded in 2013, Kasisto enables financial institutions to service, engage and acquire customers via human-like, intelligent conversations – anytime, anywhere. Kasisto's Conversational AI platform, KAI, powers omni-channel virtual assistants & chatbots who are fluent in banking across mobile apps, websites, messaging platforms, & voice-enabled devices. Contact us to learn more, [sales@kasisto.com](mailto:sales@kasisto.com)