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

$50+ trillion of investable assets over the next decade will be transferred from one generation to another. This shift in generational wealth will bring big changes in how financial advisors and wealth managers will engage with their clients. And a new investor demographic will demand digital capabilities that deliver an intelligent and friction free investment experience. Conversational AI, and the Intelligent Digital Assistant will be the centerpiece of many of these digital investment experiences.

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 digital assistant gets to know your customers, learns their goals, life plans, & what’s really important to them financially - and intelligently assists the investment professional throughout their financial journey, anytime, anywhere.

KIM also assists the financial advisor, by providing answers & insights, quickly responding to portfolio and investment questions & helping them to service their customers, cost effectively, intuitively and insightfully.

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

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

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

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

— Boston Consulting Group
Pre-packaged Banking Knowledge Speeds Time to Market

On day one, KAI is fluent in banking.

INTENTS

Goals
- INVESTMENT
- RETIREMENT
- EDUCATION

Account Information
- BALANCES, PAYMENTS, & TRENDS

Financial Literacy
- FAQS DEFINITION OF FINANCIAL PRODUCTS
- FAQS ABOUT INVESTMENT PRODUCTS
  (YOUR BANK'S PRODUCTS)

Portfolio Performance
- VALUATION & TRENDS
- BUYS & SELLS

Market Performance
- BENCHMARKS
- PRICING & TRENDS
- EVENTS

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

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