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.

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.

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.

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

You have $97,937.07 and owe $22,719

Sure

Commodities, or products used for commerce the physical or tangible items, are stored on a separate, authorized commodity platform.

Sure

Your initial investment of $50,000 has grown at 25% per annum. Your current available balance on your investment account ending in 1/000 is $75,000

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

Sure

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

Hm... Let’s see...

Your initial investment of $50,000 has grown at 25% per annum. Your current available balance on your investment account ending in 1/000 is $75,000

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

Yes or 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

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