

FINANCIAL ADVISOR RESOURCE GUIDE



ABOUT OPTIMAL ADVISORA

The AI Learning Partner for financial services firms. We help financial professionals simplify AI and adopt it effectively to **save time** and **drive growth**. Our **customized, use-case-driven training programs** show participants how to **save 3–5 hours each week** by integrating AI into their daily workflows.

Areas Where AI can Help in a Financial Planning

Practice

- Read & Summarize
- Internal Office Emails
- Market Research
- Document Review
- LinkedIn Post
- Respond to Client Email
- Investment Research
- Proofread your Documents
- Write Email or Client Proposal

Prompts to Get You Started

“I’m a financial planner and new to AI. Please provide 8 to 10 prompts I can use to be more productive and efficient in my practice to help my clients achieve their financial goals. Be specific.”

With your specific context, here are additional words to use for prompting in any AI model:

- Summarize
- Create
- From the perspective of
- Compare this
- Write
- Provide
- Explain it to me like I’m a 4th grader

What Expert do you need?

Hire an assistant

- *Human Resource Specialist or Recruiter*

Analyze an investment

- *Global Macro Specialist or CFA Charterholder*

Write on LinkedIn

- *LinkedIn Posting Specialist*

More Client referrals

- *Sales Business Coach*

How Advisors Use AI?



- Emails Newsletters
- Social Media Marketing
- Reports & Commentary
- Talking Points Internal
- Memos Proposals & Pitches Compliance



- Whitepapers
- Research Reports
- Investment Articles
- Earnings Calls Videos
- Regulatory Updates
- Conference Materials
- Competitor Materials



- Personalized Emails
- Client Meetings
- Client Objections
- LinkedIn Posts
- Article Writing
- Strategic Coach Find
- New Clients Host
- Client Events

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Optimal AI Learning Center

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