



## What's an Artificial Intelligence Got To Do With It?

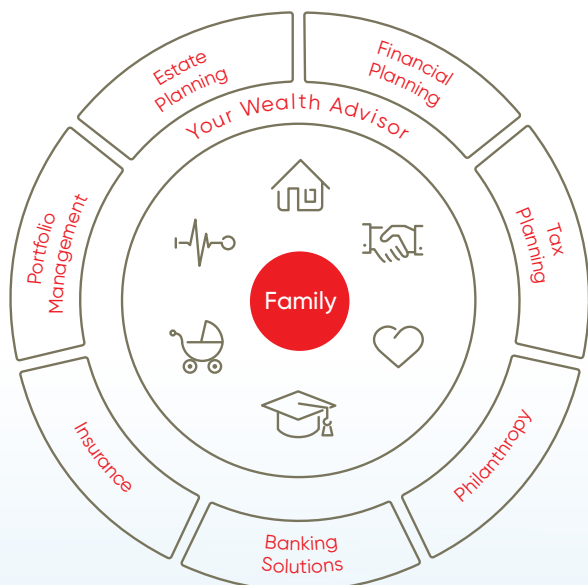
Artificial Intelligence or AI has been one of the topics repeatedly making headlines in recent months. AI is not a new topic, but the recent advancements in applications like ChatGPT have shown just how powerful AI can be. The thought of a computer being able to replicate human-like thoughts and actions can feel a bit uneasy. There are added risks that come with the advancement with AI, which we do not take lightly and are continuing our diligence when it comes to emails and any communication we receive regarding our clients' accounts. There are also benefits to AI that help with efficiencies to better serve our clients and research the best investment opportunities. We wanted to touch on the topic of AI a bit further to show how it is impacting the way we operate our business and transforming the financial services industry as a whole.

One element of AI that has affected the investment industry when it comes to product research is Natural Language Processing (NLP). NLP removes the need for a human to read large quantities of articles or listen to multiple earnings calls in order to provide research on a specific investment. Through NLP, the review time of a company can be drastically reduced by using software programs that go through millions of articles to gather key words that help to determine public sentiment. This doesn't eliminate the need of portfolio managers to research the investments they are recommending

for clients, but it helps with know your product requirements to give move timely investment research from a larger quantity of sources than what one person can analyze. As an extension of this, it also allows access to investment advice for a larger quantity of people. With our service offering, we provide a large suite of services beyond investment management. We work with our clients to build a financial plan, look for tax reduction strategies and have experts in estate planning and insurance. These services are all covered under our fees, but some individuals new to investing may just want automated financial advice that they can get through an online platform. With AI generated investment models, more people can build their wealth by accessing automated financial strategies that handle investment selection and rebalancing.<sup>1</sup>

As trusted wealth advisors, the most important part of our role is spending time with our clients. By meeting with clients and discussing financial goals, we can plan to see how your investments can get you there. We feel that AI can't take away this human connection, but it can help to increase efficiencies in areas like investment selection and operations. We want you to know the services we provide! Please reach out and we can discuss the below elements that fall under our complete wealth offering.

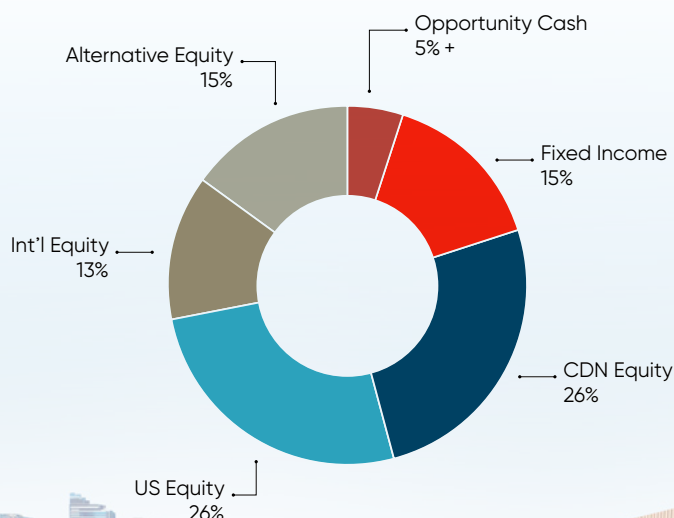
<sup>1</sup> [Artificial Intelligence Applications In Investing \(forbes.com\)](https://www.forbes.com/advisor/artificial-intelligence/investing/)



## Maximum Growth Investment Model Goal Asset Allocation

### Your Investment Policy **MAXIMUM GROWTH PROFILE:**

You want to maximize the growth of your investments by investing all or most of your portfolio in equities. In doing so, you accept a higher level of risk and change in the value of your investment in the hope that your returns will ultimately be higher. If you feel that your risk tolerance is shifting, please let us know!



**Source:** This information is for illustration purposes and subject to change. Your portfolio may not hold all of these positions. We enhance the composition of your portfolio with additional equity solutions that are not illustrated. The weightings change with market fluctuations and model rebalancing.



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