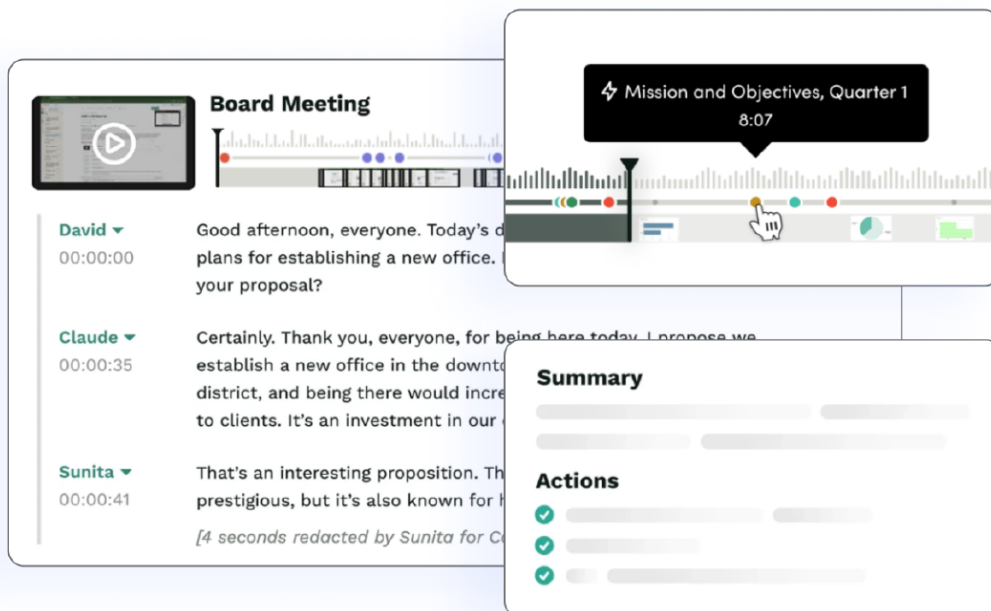# Parrot AI™ by Advisor360°

Your AI-Powered Assistant—Built for Advisors

Parrot AI is your always-on, always-accurate meeting assistant—built for financial advisors who want to spend less time taking notes and more time taking action. Whether you're on Zoom, in person, or recording a quick explainer, Parrot AI captures, organizes, and transforms your conversations into searchable insights and secure, shareable next steps.

Designed with enterprise-grade security and compliance in mind to help you stay productive, proactive, and protected—so you can focus on building relationships and growing your practice.

Why Parrot?

→ **Built for Advisors:** Designed specifically for the pace, privacy, and complexity of advisor-client conversations.

→ **Compliant by Design:** Enterprise-grade security and advisor-controlled AI outputs ensure compliance with FINRA, SEC, and firm policies. Parrot never shares or trains on your data.

→ **Zero-Lift Documentation:** Automates note-taking, meeting summaries, and CRM updates—no manual entry required.

→ **Instant Insights:** Parrot not only remembers—it thinks. Ask questions, generate follow-ups, and find key moments with smart search and Chat AI.

Key Features

🗗 Magic Moments & Clips

Highlight key points from any meeting with editable "clips" of transcript, video, and audio. Redact and share with ease.

⊘ Multichannel Capture

Join Zoom, Teams, Meet, or Webex calls—or record in-person meetings and phone calls. Parrot adapts to how you work.

🖳 Collaboration-Ready Pages

Store and organize meeting takeaways on flexible, media-rich pages. Add comments, links, tasks, and team notes.

AI-Generated Summaries & Actions

Share polished, editable summaries and follow-ups within seconds of ending a meeting.

⌕ Precision Search & Smart Folders

Find anything fast with AI-enhanced search, topic detection, and household-based folder structure.
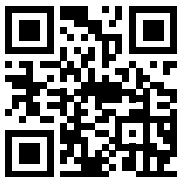
Is Parrot Right for You?

If you're a financial advisor looking to:

- Spend less time documenting and more time advising
- Keep client data secure while embracing AI
- Eliminate manual note-taking and improve follow-through
- Create a searchable, shareable knowledge base for your team

...then Parrot AI is your next best hire. To learn more, visit www.advisor360.com/why-parrot

Try Parrot AI Free for 14 Days

Start your trial at app.parrot.ai/join and let your best ideas take flight.

ParrotAI
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