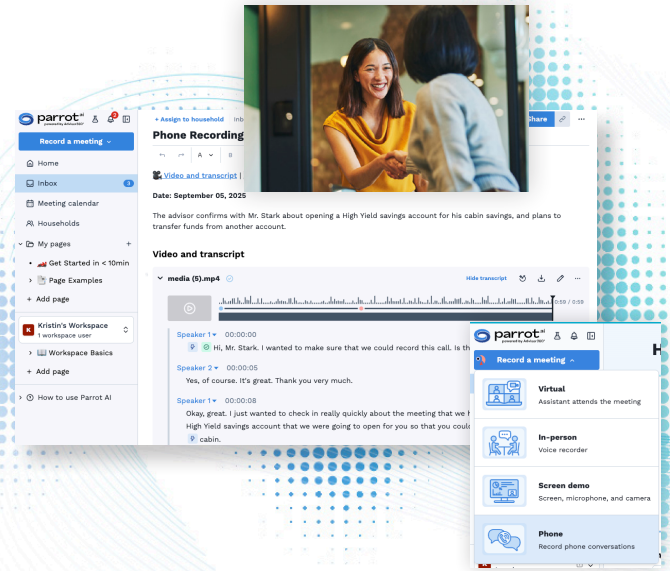


# Parrot AI by Advisor360°

The only AI assistant built natively into Advisor360° for financial advisors.

Parrot AI® isn't another notetaker, it's the intelligent agent that helps advisors prepare, engage, and follow up with the precision of an intelligent CRM.

Parrot organizes conversations and client documents at the family (household) level, connects insights across meetings, and identifies opportunities to better serve clients.



## Benefits

Parrot AI helps advisors grow their business by setting a new standard for advisor productivity and client service. With household-level organization, mobile-first access, and search across their entire book of business, advisors can quickly identify opportunities and deepen client trust.

### Instant Insights with Ask AI

Use **Ask AI** to query your entire book of business including meeting notes and uploaded documents to surface growth opportunities or client details in seconds.

### Advisor Productivity, Anywhere

With the Parrot mobile app, advisors stay productive anywhere—access household context, query documents with Ask AI, and place secure, CRM-synced calls on the go.

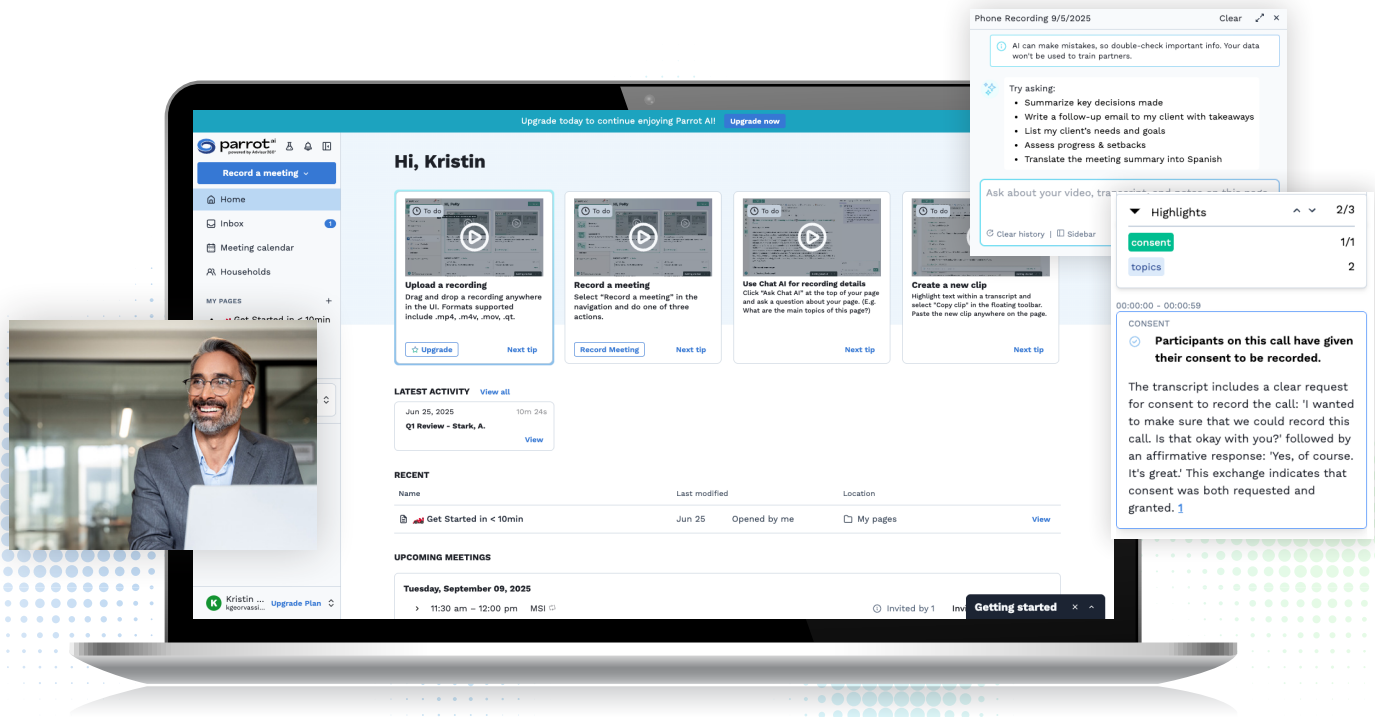
### Elevated Conversations, Automated Admin

Enter every client meeting prepared and exit with actionable follow-up tasks. Save hours each week by turning client conversations into instant CRM updates, actionable summaries, and immediate follow-up tasks.

### The Household Advantage

Organize insights, stored documents, and actions at the household level to seamlessly manage complex, multi-generational relationships.

Click [here](#) or go to [www.advisor360.com/parrot-ai](http://www.advisor360.com/parrot-ai) to learn more or set up a demo.



## How it works

Parrot AI captures and activates every detail of a client interaction—securely transcribing conversations, highlighting key moments, and turning them into actionable summaries, follow-ups, and CRM updates within minutes. Built for financial advisors, it ingests and organizes client documents alongside meeting notes, giving advisors a complete picture of each household.

### AI-Generated Summaries, Documents and Actions

Generate polished, editable summaries, follow-ups, and key takeaways from meetings and financial documents within seconds.

### Magic Moments and Clips

Highlight key transcript or video snippets, redact sensitive information, and share securely.

### Multichannel Capture

Join Zoom, Teams, Meet, and Webex calls—or record in-person meetings and phone calls.

### In-App Calling

Parrot records and captures conversations automatically.

### CRM-Sync Automation

Schedule recordings and push notes or tasks directly to the Advisor360° CRM to eliminate manual data entry.

### Precision Search and Smart Folders

AI-enhanced search and household-based workspaces make it easy to find anything in seconds.

### Compliance Controls

Built-in client consent prompts, advisor-approved outputs, and integration with retention and archiving policies.

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