



blv solutions

Filenote.ai

September 2024



BLV Solutions

Who We Are

- Automation and AI experts
- Specialised in Wealth Management

What We Offer

- AI Solutions tailored to Financial Advisors



PRODUCTIVITY

Freed up human resources for high value-added tasks.



CONSISTENCY

Identical processes, eliminates variations.



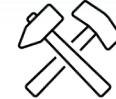
ACCURACY

The right result, decision or calculation the first time.



ROI

Identical processes, eliminates variations.



RELIABILITY

Freed up human resources for high value-added tasks.



AUDIT TRAIL

The right result, decision or calculation the first time.



SCALABILITY

Identical processes, eliminates variations.



RETENTION

Freed up human resources for high value-added tasks.



RIGHT-SHORING

The right result, decision or calculation the first time.



The Problem

Creating file notes is necessary but is time-intensive.



WHAT WOULD YOU DO WITH AN EXTRA 28 DAYS PER ADVISOR PER YEAR?



The Solution: Filenote.ai

- » Automatic generation of a file note and client summary email
- » Specialised for Australian wealth management firms
- » Specific templates for different meeting types: Discovery, Review, SOA
- » Ability to tailor the templates to suit your needs
- » Supports Teams, Zoom and in-person meetings.



Filenote.ai In 3 Simple Steps.

Unlock Productivity, Consistency, And Compliance.



Features included with filenote.ai:

- Automatic generation of file notes, client summary email and full transcript
- Templates for: Review meetings, Discovery meetings and SOA Presentations
- Tailor templates to suit your needs
- Can CC others on your file notes
- Option to write the file note in first person



What Our Clients Say

- » “Filenote.ai is producing a **more detailed** File Note than our advisors”
- » “Change management was a breeze!”
- » “Filenote.ai has given us the capacity to **take on 10% more clients.**”
- » “Value of saving 1 AFCA complaint easily **covers the annual cost** of Filenote.ai.”



Pricing Plans (\$AUD)

* Offer valid only to Centrepoint Alliance firms
Plans subject to change.
Pricing excludes GST

21 DAYS FREE TRIAL

STANDARD

\$139

/ user / month

Inclusions

- 20 hours upload limit/user/mth
- 4 hour max per meeting (video)

Key Features

- Meeting File Note
- Client Email Draft
- Detailed meeting transcript
- Platforms: Teams, Zoom, in-person

Centrepoint Alliance Extras

- 20% more hours (24 hours/user/mth)
- Custom Centrepoint Alliance template

PRO

\$249

/ user / month

Inclusions

- 40 hours upload limit/user/mth
- 4 hour max per meeting (video)

Everything in Starter, Plus

- Custom FileNote template (BYO)

Centrepoint Alliance Extras

- 20% more hours (48 hours/user/mth)
- Custom Centrepoint Alliance template

ENTERPRISE

CONTACT SALES

20+ Advisors

Inclusions

- Discounted volume pricing
- 4 hour max per meeting

Everything in Pro

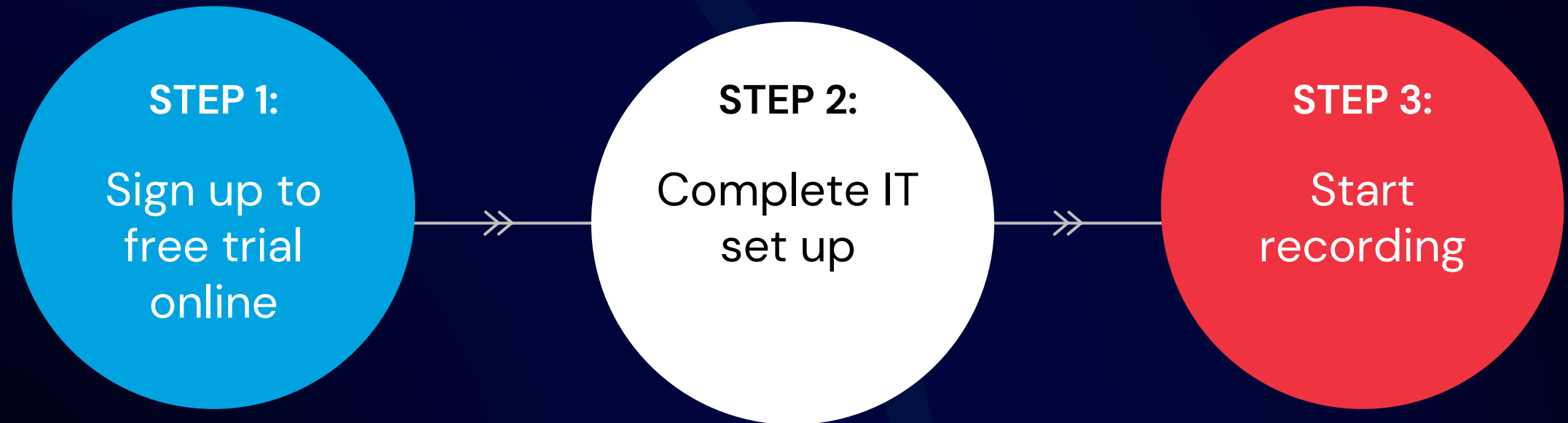
Terms:

- Minimum 12 month commit



Getting Started

Start recording your meetings and you are ready to go!





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Appendix

Teams App

Record In-Person Meeting

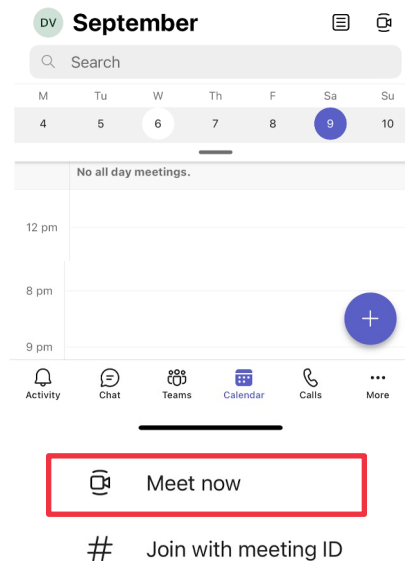
STEP 1:

Log on to Teams App on Phone.



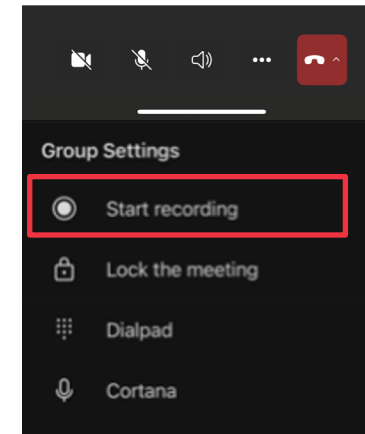
STEP 2:

Select 'Meet Now' to create new meeting.



STEP 3:

Click 3 dots and select 'Start Recording'.



Note – make sure you are not muted and keep the phone open



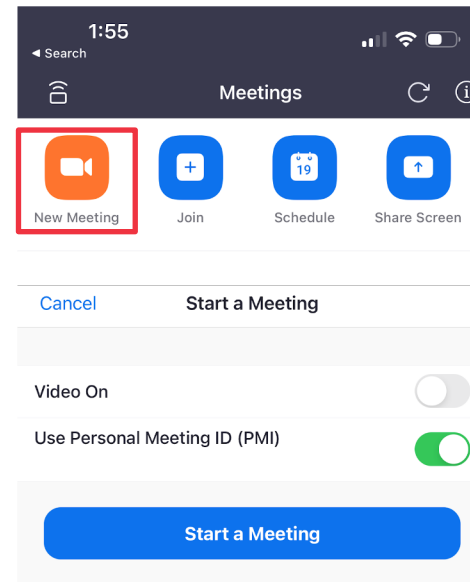
Zoom App

Record In-Person Meeting

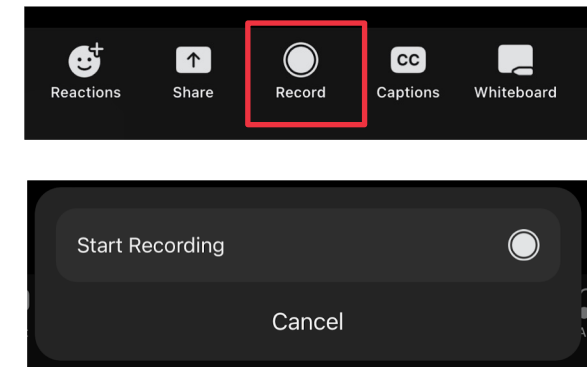
STEP 1:
Log on to Zoom App
on Phone.



STEP 2:
Select 'New Meeting' to
Start a Meeting.



STEP 3:
Click 'Record' and select 'Start
Recording'.



Note – make sure you are not
muted and keep the phone open



Different Meeting Types

How to Trigger the Correct Template

You simply need to adjust your meeting name to include the following key words:

Discovery Template:

- Initial
- Discovery
- Discover
- First

SOA / Plan Presentation Template:

- SoA
- Present
- Presentation
- Statement of Advice

Review Template:

Anything else will default to the standard Review File Note template

Data Security and Privacy FAQs

What does my IT need to do?

We will provide your IT admin with a Microsoft App Registration. Admin Consent link that will grant filenote.ai the necessary permission. for the solution to function. Your IT will need to agree to deploy the App Registration on behalf of the tenant using the Microsoft link.

What happens to the video recording?

No video is downloaded or kept by us. Our solution uses the Microsoft App Registration to create a temporary access link (valid for 60 min) to your recording for transcription purposes.

Where are your servers based?

Our control room infrastructure is by default based in EU to ensure strict compliance to GDPR is met. We spin up runtime locally at no extra cost to our clients. In particular, run time is spun up in Australia for Australian and non-US clients, US run time for US clients. We use on demand containers to host runtime environments and they are destroyed at the completion of each run.

What is the app registration?

As a Microsoft Partner, Microsoft has given us the ability to deploy our filenote.ai via a multi-tenant Microsoft App Registration into your Microsoft tenant. App Registration specifies the level of access required and consent must be given by your tenant admin.

What level of access is required?

Filenote.ai strives to request the minimum level of access for the solution to function. In particular, the solution requests access to poll your chat in Teams to identify meetings (without access to calendar or email) and permission to create a temporary link of your recording as it displays in Teams.

How are you securing the environment?

The underlying infrastructures of filenote.ai are SOC2 Type II and GDPR compliant. Integration points and the overall architecture are designed by a certified GIAC penetration testing specialist. The environment is designed to not retain data post processing except log-data for debugging and billing verification purposes.

Data Security and Privacy FAQs

What does my IT need to do?

We will request your IT admin to provide a Zoom Serve-to-Server OAuth that will grant filenote.ai the necessary permission for the solution to function.

What happens to the video recording?

No video is downloaded or kept by us. Our solution uses the Zoom Serve-to-Server OAuth to access your recording for transcription purposes.

Where are your servers based?

Our control room infrastructure is by default based in EU to ensure strict compliance to GDPR is met. We spin up runtime locally at no extra cost to our clients. In particular, run time is spun up in Australia for Australian and non-US clients, US run time for US clients. We use on demand containers to host runtime environments and they are destroyed at the completion of each run.

What is Zoom Server-to-Server Oauth?

Zoom Server-to-Server Oauth is the preferred system to system level integration approach. Filenote.ai uses this approach to request the correct level of permission and retrieve the access link for recording without needing to download the video.

What level of access is required?

Filenote.ai strives to request the minimum level of access for the solution to function. In particular, the solution requests access to poll your meeting in Zoom to identify meetings recorded for the named user.

How are you securing the environment?

The underlying infrastructures of filenote.ai are SOC2 Type II and GDPR compliant. Integration points and the overall architecture are designed by a certified GIAC penetration testing specialist. The environment is designed to not retain data post processing except log-data for debugging and billing verification purposes.

Ready to get
started? Let's go.

Contact Us: hello@blvsolutions.com

