AI as a Force Multiplier for Financial Advisors and FA Teams

September 30, 2025 | 4:15 PM EST | Zoom Webinar

Presented by **Tier1 Level Consulting**

Hosted by **Curtis C. Brown, Jr.**, President and CEOFeaturing **Marsha Jones**, Partner | **Robert Ross**, Partner | **Cindy Beouy**, Operations LeaderAll Tier1 team members are AI-Certified

Why AI, Why Now?

The AI Revolution is Here for Financial Services

Artificial Intelligence isn't just transforming tech companies—it's revolutionizing how financial advisors operate, engage clients, and scale their practices. The wealth management industry is at an inflection point where AI adoption separates thriving practices from those falling behind.

Enhanced Efficiency

AI streamlines administrative tasks, freeing up 40% more time for client-facing activities and strategic planning.

Precision Analytics

Advanced algorithms provide deeper client insights and more accurate risk assessments than traditional methods.

Stealth Team Member

AI acts as an invisible assistant, handling routine processes while you focus on high-value relationship building.

Bottom line: It's not about replacing human expertise—it's about amplifying your natural abilities and delivering exceptional client experiences at scale.

Industry Impact: Advisors using AI report 35% improvement in client satisfaction and 50% reduction in administrative overhead.

What You'll Master in This Webinar

This isn't just another theoretical presentation. You'll walk away with actionable strategies, proven frameworks, and real-world applications that you can implement immediately in your practice.

01

Real-World AI Use Cases

Discover specific applications for client onboarding, portfolio analysis, compliance monitoring, and personalized communication strategies that top-performing advisors are using today.

02

AI-Enhanced Workflow Design

Learn how to integrate AI tools seamlessly into your existing processes without disrupting client relationships or team dynamics.

03

Tier1's Proven AI Coaching Model

Get exclusive access to our proprietary framework that has helped hundreds of advisors successfully adopt and scale AI technologies.

04

Live AI Demonstration

Watch our experts demonstrate cutting-edge AI tools in action, showing exactly how they enhance client meetings and streamline operations.

05

Interactive Q&A Session

Get your specific questions answered by our AI-certified team and connect with other forward-thinking financial professionals.

Meet Your AI-Certified Expert Team

Our presenters aren't just consultants—they're practicing AI strategists who have successfully implemented these technologies across hundreds of financial advisory practices.

Curtis C. Brown, Jr.

President & CEO Visionary leader and author, with 30+ years in wealth management. AI strategist who has guided over 500 advisory teams through digital transformation. Known for turning complex AI concepts into practical, profitable solutions.

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Marsha Jones

Executive Vice President & Strategic Partner

30 + years in Wealth Management. Expert in practice management optimization and client engagement strategies.

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Robert Ross

Executive Vice President & Strategic Partner30+ years in wealth management. Helps advisory teams seamlessly adopt new technologies while maintaining their unique client service approach.

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Cindy Beouy

Operations & Client Engagement Leader Operations excellence expert who transforms back-office processes through intelligent automation. Focuses on AI applications that enhance team productivity and client satisfaction.

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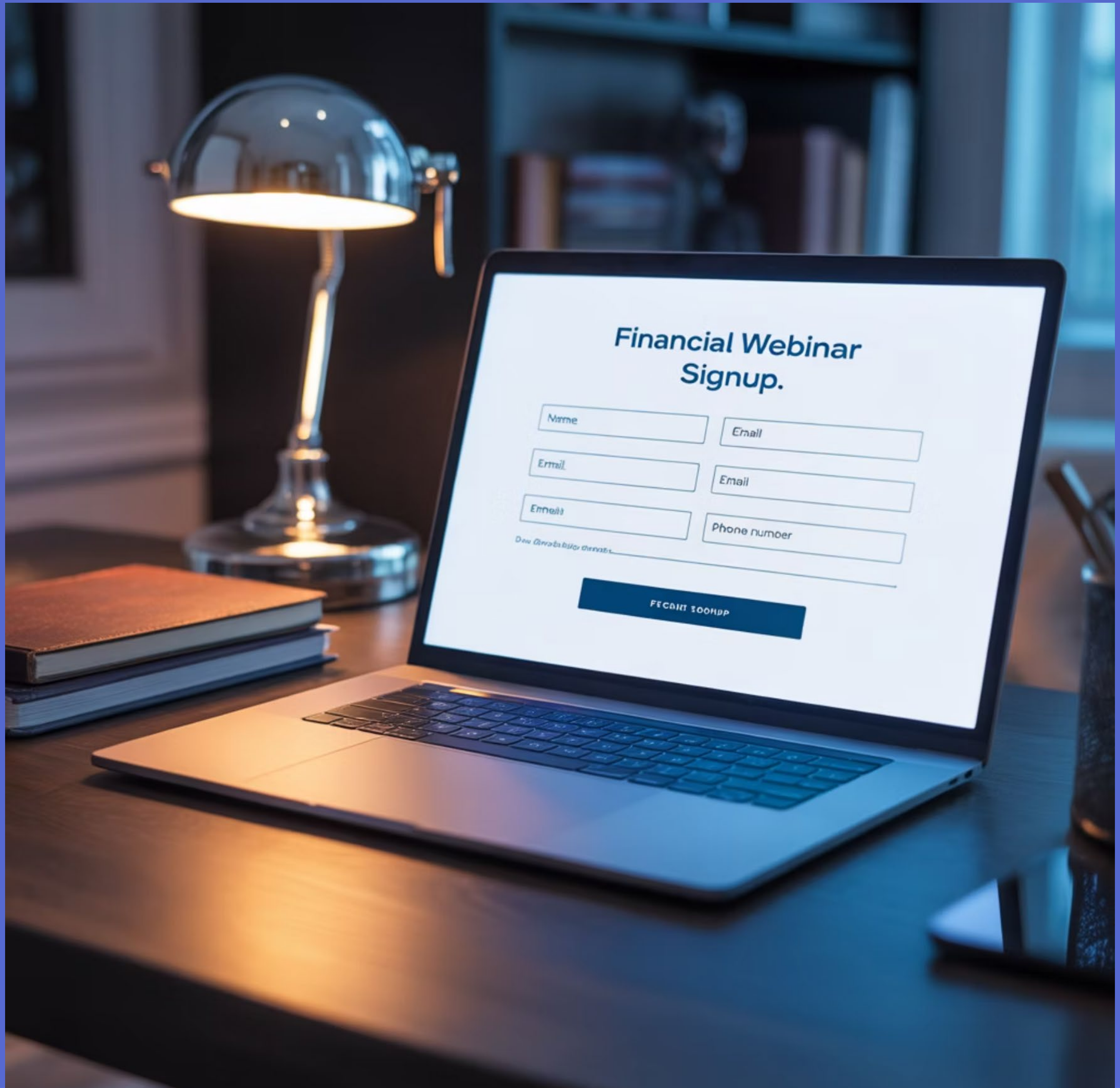
Credential Advantage: All Tier1 team members maintain current AI certifications and continuously test emerging technologies in real advisory environments.

Reserve Your Spot Today

Transform your practice with AI guidance from the industry's leading experts



Easy Registration

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Questions: Call our team directly