AI Note-Taking Tools for Financial Advisors

Insights from the Oasis Group's 2025 Report

The Oasis Group

Advisor Impact – What It Means for You

Cost & Time Savings

Less manual documentation.

Less people in the meeting.

Client Recall

Stronger conversation continuity.

Personalization

Enhanced follow-up quality.

Compliance

Better audit trails.

Our Research Approach

1. Tools Analyzed

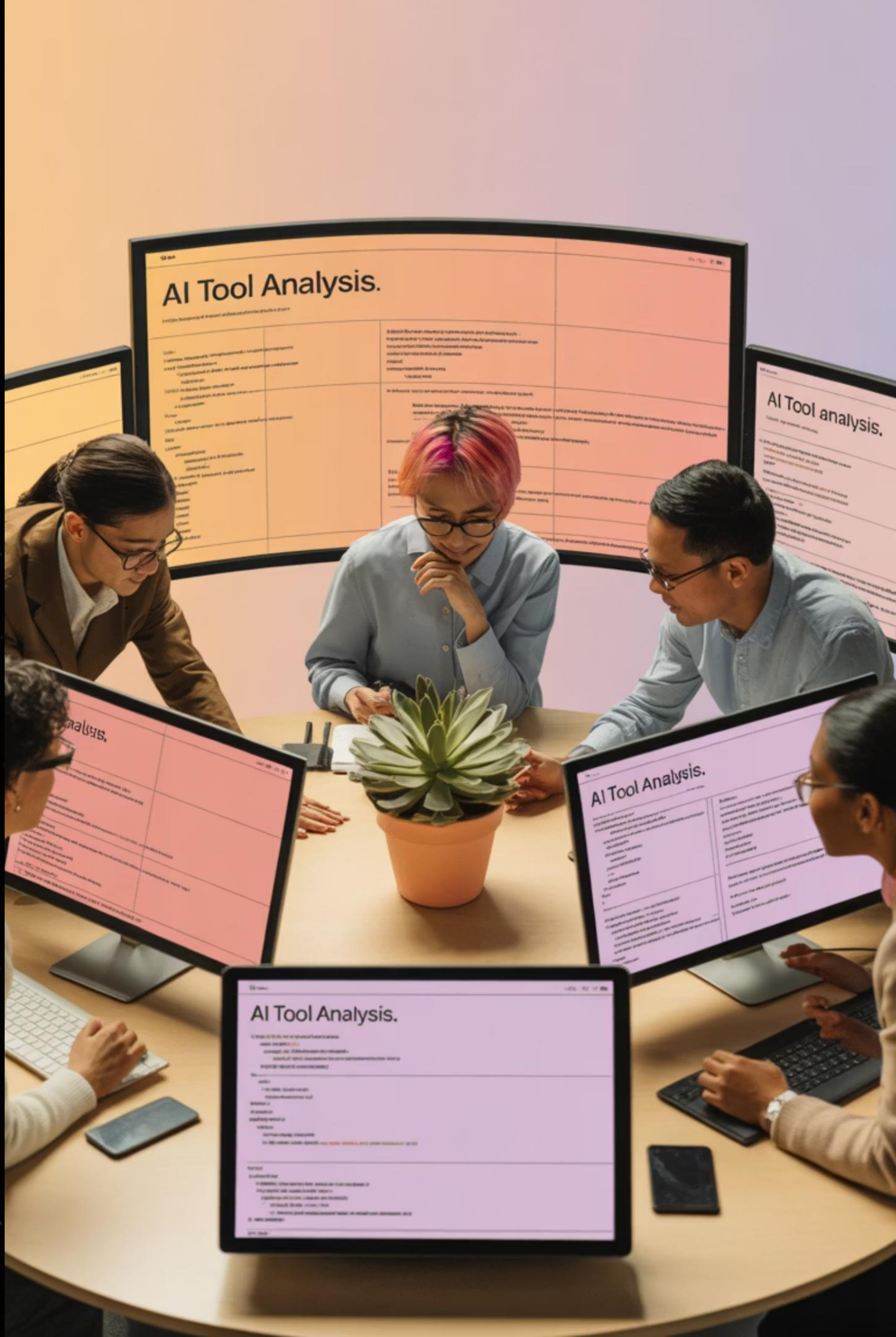
   FinMate, GReminders, Jump, Mili, Zeplyn, Zocks

2. Testing Method

   Standardized scripted client conversations

3. Evaluation Criteria

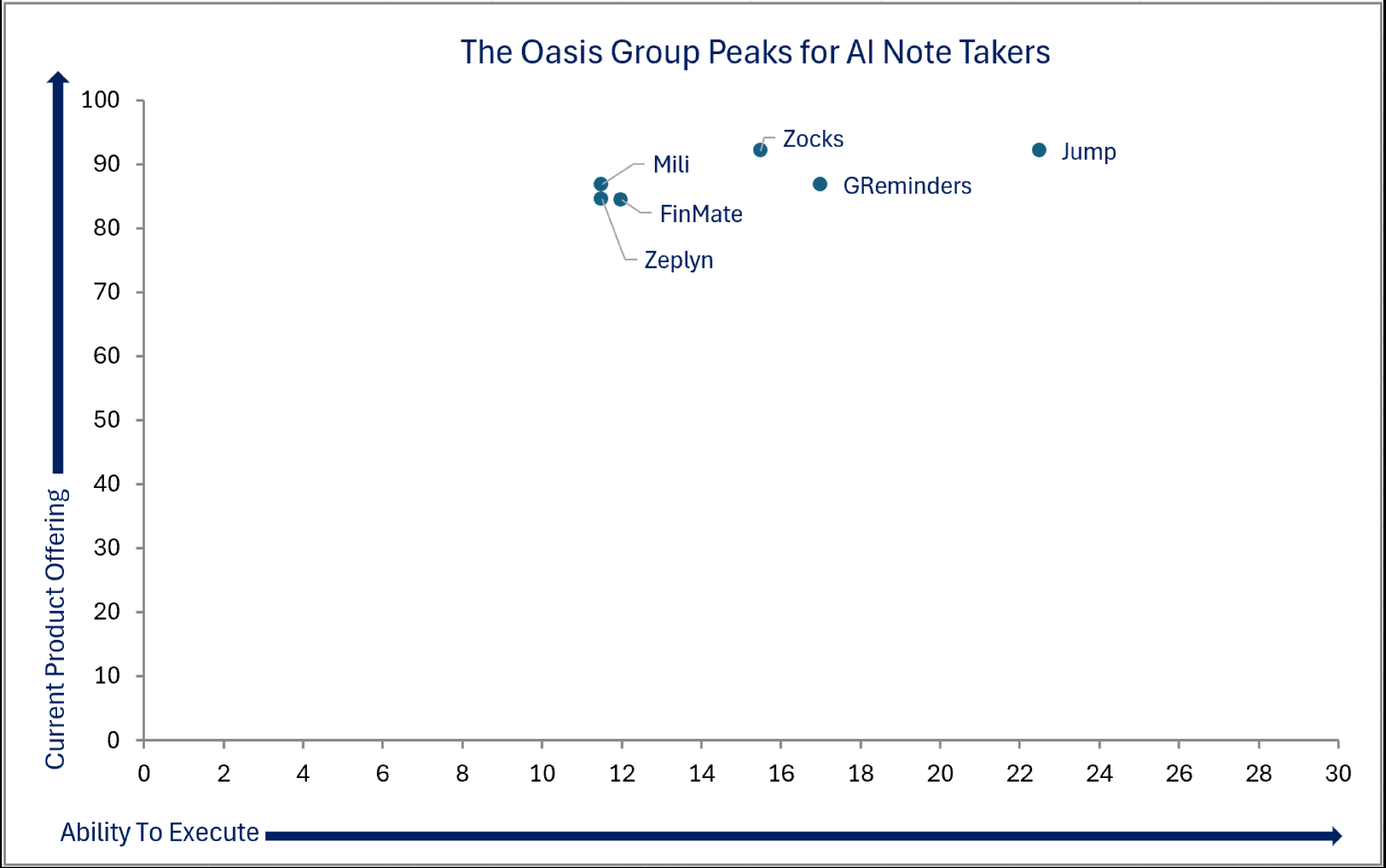
   Transcription, action items, UI/UX, integration, compliance



Key Industry Observations

- Tools target financial advisors specifically
- Broad meeting platform compatibility
- High transcription accuracy
- Varying action item intelligence
- CRM workflow integration is increasing

Oasis Group Peaks Rankings



Best Practices for Implementation

Pilot Testing

Start with key advisors

Customize Templates

Tailor to firm workflows

Leverage CRM Sync

Automate data entry processes

Train Review Workflows

Establish note editing procedures

Compliance Approval

Ensure oversight of synced notes. Maintain the HITL.

Q&A and Thank You

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