



Breakfast Briefing

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Financial Planning
ADVISE | AI
.....

**Discover How AI-powered Solutions are
Transforming Advisor Productivity
and Investor Engagement**



Zane Keller, CFP

CEO,
Ducere Wealth

- **Founder of Ducere Wealth**, bringing a modern approach to wealth management
- Extensive **leadership experience across financial services**, consulting, and technology sectors
- **BlackRock RIA Leadership Lab**; part of the Schwab Executive Leadership Program
- Serves on **JP Morgan RIA Advisory Council**



Babu Sivadasan

Co-Founder & CEO,
JIFFY.ai

- **25+ years** in fintech innovation
- Passionate about building **technology that empowers advisors and clients** alike
- Founded JIFFY.ai in 2018; **Secured Series-A funding in 2020 and Series-B in 2022**
- Former President of **Investnet (NYSE: ENV)**, CTO of **Stamps.com (Nasdaq: STMP)**
- Active **angel investor and mentor**, supporting startups in Silicon Valley and India

Client Experience, Operational Efficiency, and Advisor Experience



Client Transition & Experience

Onboard clients into our firm with no friction and deliver unmatched client experience.

Technology for Operational Efficiency

Partner with firms like JIFFY.ai to reduce handoffs, eliminate manual tasks, and measure execution.

Advisor Experience & Client Depth

Free advisors from administrative work to focus on meaningful client conversations.

What We Believe at Ducere Wealth

“ Delight our clients at every touchpoint ”

“ If you can't measure it, you can't improve it. ”

“ Spend less time cooking and more time dining ”



Past: Fully In-House

Building and maintaining everything internally required significant resources and specialized expertise.



Now: Fully Outsourced

Relying entirely on external vendors and platforms is sacrificing customization for convenience.



Future: Customized Outsourcing

A tailored blend that strategically fits firm goals, combining best-of-breed solutions with seamless integration.

The Challenge

Too many technology options create infinite combinations. Without clear strategy, firms risk creating fragmented systems that increase complexity rather than reducing it.

The Opportunity

Leaders who adopt latest technology and create the seamless ecosystem for experience, time savings, and scalability from the start will win. Great firms won't settle for "good enough" technology. They will relentlessly pursue top tier technology.

The Challenge

We knew what tools we needed, but finding a partner to understand our **Business** and **Technology** goals and keep us **prepared for what's ahead**.

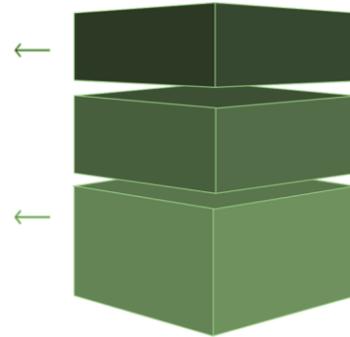


The Solution

JIFFY.ai did not just offer solutions—they delivered an AI powered unified ecosystem that is **Broad, sophisticated, and scalable**. This was our breakthrough moment.

Broad
Enough to partner across life cycle from **meetings to ongoing engagements**.

Scalable
Across **advisors, offices, and markets** without sacrificing performance.



Sophisticated
Enough to bring the **power of ecosystem and latest innovation** together

SHARED VISION FOR THE FUTURE

1. HUMAN-CENTERED TECHNOLOGY

We're building a foundation that supports more human interaction as technology handles the operational details.

2. TECHNOLOGY AS TRUE DIFFERENTIATOR

Today, the best firms leverage technology to create more time for in-person engagement, because that is the ultimate true differentiator.

1

Grow Topline

Organic

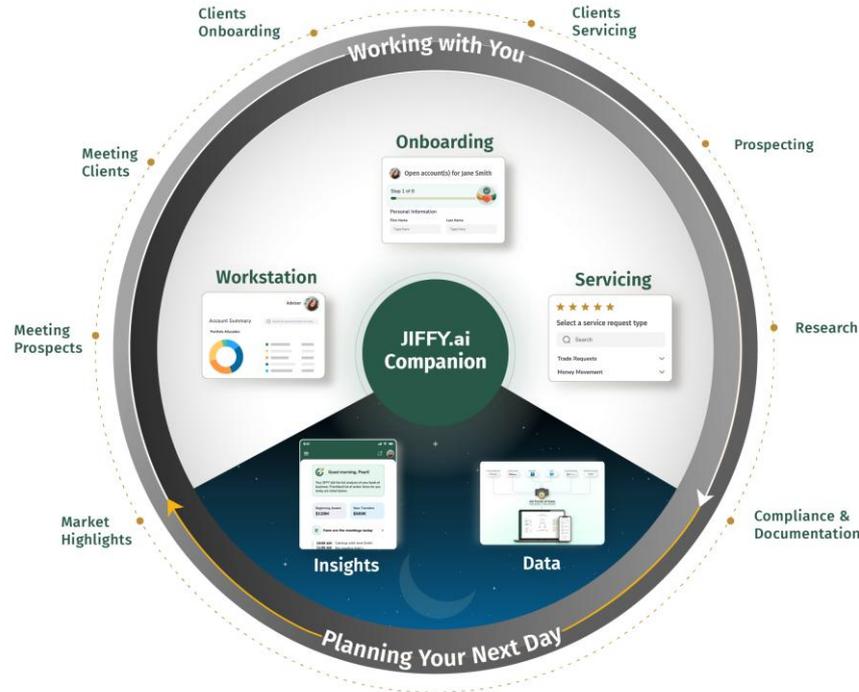
Inorganic

2

Improve Bottom-Line

3

Enhance Brand Positioning



Unify Data. Unlock Insights. Uplift Experiences.

J Financials Pearl

Good morning, Pearl!
Your JIFFY did the full analysis of your book of business. You might want to reach out to the following clients today.

Here are your meetings for the day

- 10:00 AM** Catchup with Jane Smith
[View pre-meeting brief >](#)
- 11:00 AM** Portfolio Review with John
[View pre-meeting brief >](#)
- 01:00 PM** Portfolio Review with John Doe
[View pre-meeting brief >](#)
- 01:30 PM** Catchup with Jane Smith
[View pre-meeting brief >](#)

John Doe had requested \$15,000 withdrawal and it is done.
[Email John](#) [Call John](#)

Jane's new account paperwork is ready for your signature.
[Review](#) [Sign](#)

Market Activity for this week maybe uncomfortable for the following clients.

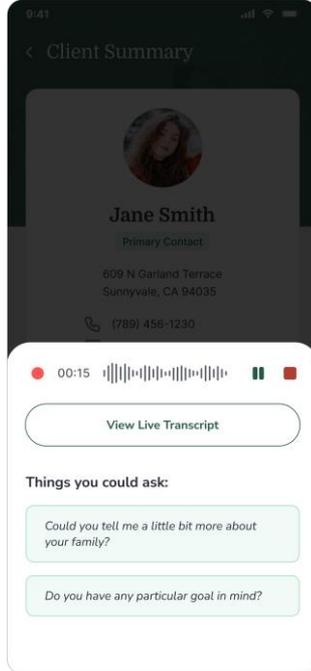
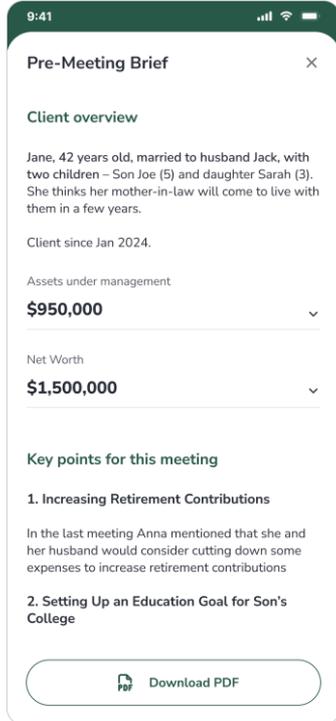
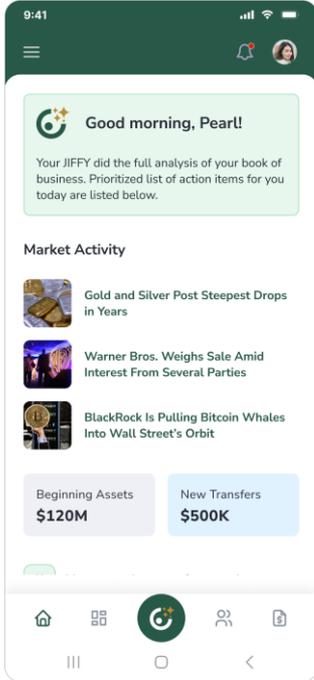
- Dallas Mike**
- Latoyi Roy**

[Email newsletter to these clients](#)

- Brian Pandit**
- Antonieta Fereir**

[Review and Adjust](#)

Search or ask JIFFY



15+ Hours/Week

Reclaimed for client engagement



30–50%

Productivity boost for advisory teams



Up to 40%

Reduction in time spent on routine admin work



>30%

Increase in client capacity

John Smith Family Members

John Smith Primary Contact
Aliena Smith
Dallas Smith
CS Carmela Smith

Rep Code
Pearl Coram | NB99

Open New Accounts

Banking Accounts + Add More

Product Type Savings - Statement Sa...
Account Type Joint
Primary Owner John Smith
Joint Owner(s) Aliena Smith +1

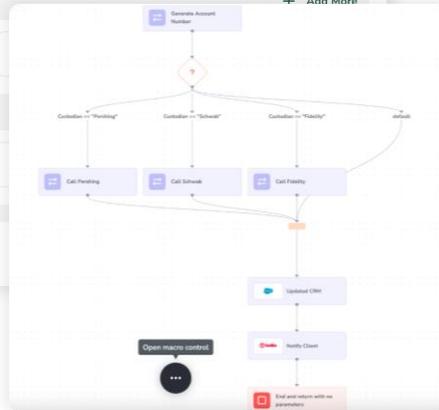
Product Type Savings - Ultimate Savin...
Account Type Individual
Primary Owner Carmela Smith

Investment Accounts + Add More

Product Type Brokerage
Registration Type Joint Tenants wi...
Primary Owner John Smith

Insurance Accounts

Product Type Life Insurance
Registration Type Individual
Primary Owner John Smith



50%

Increase in conversion rate



< 3 Min

End-to-end Straight Thru Processing (STP)



> 30%

Onboarding cost savings



< 8 Weeks

Requirements to go live

J Financials

Servicing

Total Requests 32 Assigned to Me 10 Unassigned

Service Requests

SR #	Category	Sub Category	Account Number	Client
SR-250	Treasury	New	Multiple	PRV Recruiting
SR-252	Account Maintenance	Beneficiary Update	234286758	John Doe
SR-253	Account Maintenance	General Request	150096166	Jeff Anderson
SR-255	Money Movement	ACH	145523457	Viola Davis
SR-261	Money Movement	Wire Transfer	234286432	Peter Parker
SR-213	Account Maintenance	Rep Name / Code Change	151196458	Veronica Guerin
SR-319	Account Maintenance	Name Change	234298734	Tom Hopper
SR-320	Money Movement	Wire Transfer	145513204	Jessie Collins

Powered by JIFY.ai

Create Service Request

Select a service request type

Search

Trade Requests

- Model Assignment
- Raise Cash
- Invest Cash
- Buy / Sell

Money Movement

- ACH
- Wire Transfer



30-50%

Reduction in service cost



< 3 Min

End-to-end Straight Thru Processing (STP)



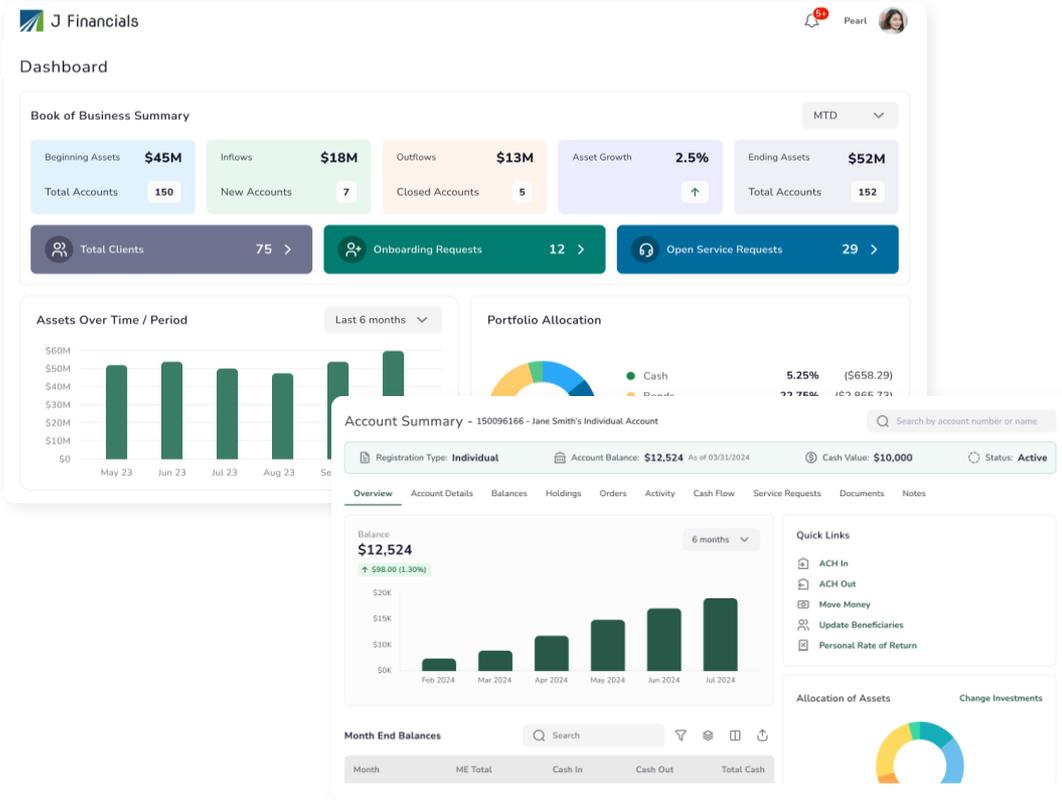
50%

Faster Servicing



< 8 Weeks

Requirements to go live



40%

Overall increase in productivity



< 3 Min

End-to-end Straight Thru Processing (STP)



50%

Faster Servicing



< 8 Weeks

Requirements to go live



Productivity

Boost for advisors



Accelerated

Decisions with real-time analytics



Reduced

Manual work and operational costs



Personalized

Client engagement

Attract. Convert. Serve. Retain. Grow.

Revenue

Faster client acquisition →
+20% AUM growth potential

Cost

Up to 50% lower onboarding
& servicing costs



Productivity

50%+ advisor service time saved

Risk & Compliance

23% fewer manual errors

Walk into our Booth #36 to watch John's story



Financial Planning
ADVISE | AI

Q&A

Download our
Engagement AI eBook

Download our Solution
Overview Brochure

See how it works for you;
Schedule a Demo



ENGAGEMENT AI E-BOOK



WEALTH SOLUTIONS OVERVIEW
BROCHURE



SCHEDULE A DEMO



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Thank you