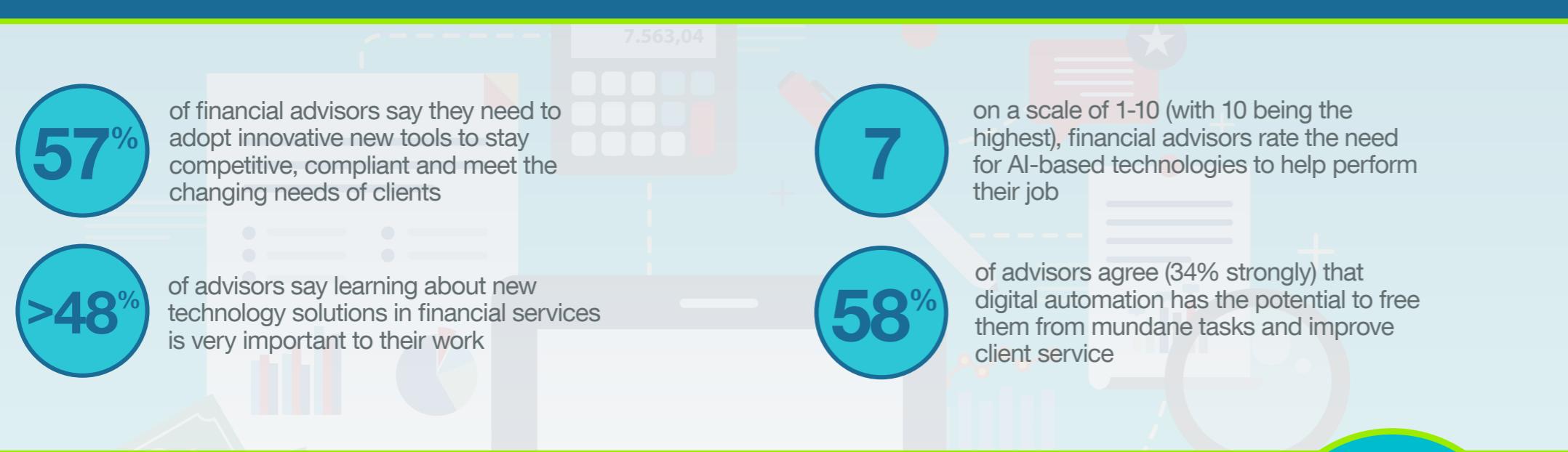




Financial advisors seek automated tools to help improve documentation productivity, compliance, and client service.

The Nuance 2019 Role of Technology in Financial Documentation **Compliance Survey** finds that automation and new AI-based tools have the potential to help financial advisors improve productivity, compliance, and deliver a better customer experience.

Awareness and demand for automation is very strong within Financial Services.



Financial advisors want solutions to help them address both customer-facing and back-office tasks.



Financial services firms can benefit from digital transformation tools.

- ✓ Create detailed client notes, plans and reports 3x faster than typing, with up to 99% accuracy
- ✓ Increase efficiency and streamline documentation processes for better client service
- ✓ Reduce risk and improve compliance and capture more detailed documentation by voice
- ✓ Spend less time on paperwork and more where it matters most – serving your clients
- ✓ Reduce administrative time and costs and your reliance on outside services

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