

# BRICKLAYER

VS.

# ARCHITECT

The financial advisory industry is at a crossroads.  
Stop laying bricks. Start designing scale.



## THE BRICKLAYER

Hunting for data, manual note transcription, and building deliverables from scratch.

## THE ARCHITECT

Designs the outcome and let AI Agents do the manual labor.





# The Architect's Blueprint

## IMPLEMENTATION WORKSHOP

PREPARED FOR:  
**Partner Firm**

HALF-DAY DEEP DIVE

## Stop Laying Bricks. Start Designing Scale.

This is not a lecture. It is a tactical, hands-on session. We build workflows live in your office. Your team will have active automations installed and ready to use.

### Deliverables: 4 Active Automations

#### 1. Pre-Meeting Prep

83% Faster

AI pulls history, summarizes recent communications, and auto-generates the agenda.

#### 2. CRM & Post-Meeting

90% Faster

Instant summary emails, automated CRM field updates, and task creation.

#### 3. Marketing Engine

Growth

Automate prospect marketing, educational content, service updates, and client re-engagement at scale.

#### 4. AI Prompting Tool Kit

Skillset

A library of "Perfect Prompts" engineered for finance to ensure compliance and quality.

### Sample Agenda (4 Hours)

- 9:00 AM - Kickoff**  
"The \$25 Trillion Disruption" - Setting the context & the "Why."
- 1 Build Phase: Operations**  
Live setup of Pre-Meeting & Post-Meeting automations.
- 2 Build Phase: Growth**  
Marketing automation setup & Prompt Engineering training.
- 1:00 PM - Wrap Up**  
Testing, Q&A, and Handover.

#### TOTAL INVESTMENT

**\$2,500 - \$5,000**

One-time implementation fee based on team size.

- ✓ 4 Active Automations
- ✓ Hands-on Training
- ✓ Immediate ROI

[Book Workshop](#)

# Partner with FIN-Tegration

Empower Your Practice with Leading AI Tools.

SERVICE	DELIVERABLES	INVESTMENT
<div>The Keynote</div> <div>Awareness</div>	<div>"The \$25 Trillion Disruption"</div> <div>45-60 Min (Virtual or Live)</div> <div>High-energy overview of the AI implementation gap. Covers the "Why" - with immediate use cases and testimonials. Advisors leave inspired.</div>	<div>\$1,000 -</div> <div>\$2,000</div>
<div>The Workshop</div> <div>Implementation</div>	<div>"The Architect's Blueprint"</div> <div>Half-Day Deep Dive</div> <div>Tactical, hands-on session. We build workflows live. Advisors leave with 4 active automations : Pre and Post Meeting Prep, CRM Automation, AI Prompting Tool Kit, Marketing &amp; Branding Automation.</div>	<div>\$2,500 -</div> <div>\$5,000</div>
<div>The Retainer</div> <div>Partnership</div>	<div>"The Investment Consultant's Partner"</div> <div>Monthly Territory Support</div> <div>Includes quarterly webinars for your region, co-branded "AI Tip of the Month" content, and discounted implementation rates for your top advisors.</div>	<div>Custom</div>
<div>"We don't just teach AI. We implement it."</div>		

Ready to accelerate outcomes? [kosal@fin-tegration.com](mailto:kosal@fin-tegration.com)



# The \$25 Trillion Disruption

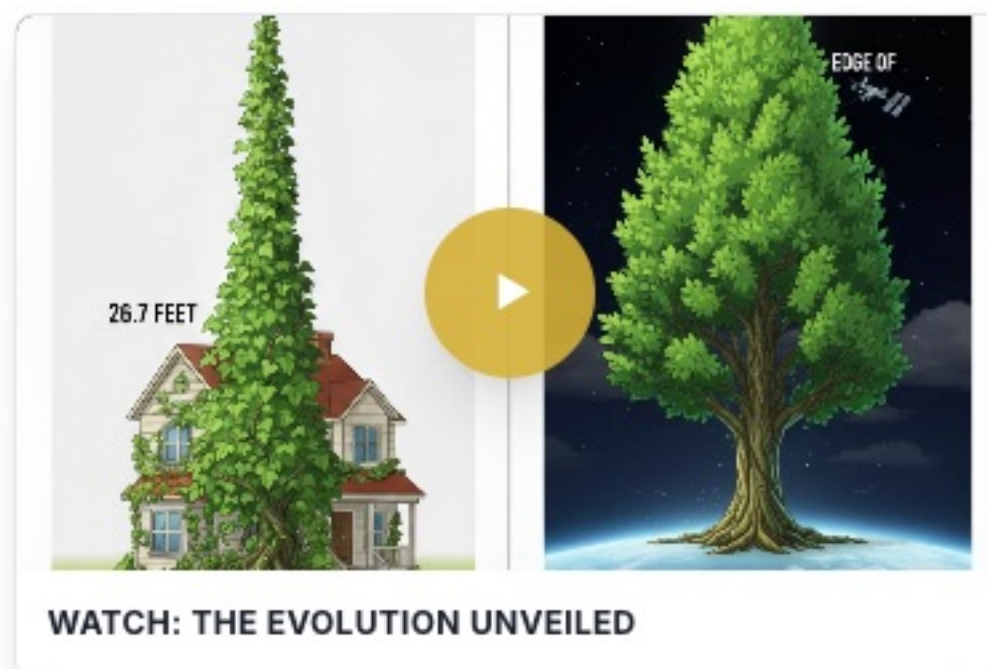
We are entering a "Dangerous Phase." The displacement of knowledge work is not a prediction—it is a mathematical certainty.

## The End of Linear Growth

For decades, we lived by Moore's Law—predictable, linear growth. We have now entered the era of **Hyper-Moore's Law**. Capabilities are doubling in months, not years.

A 6-inch plant growing linearly for a decade reaches 16 feet. Under Hyper-Moore's Law, that same plant would reach outer space.

"This is an existential phase. You cannot 'wait and see' with exponential math."



## The Displacement Crisis

The "Bricklayer" work of finance—hunting for data, transcribing notes, building deliverables from scratch—is being done with AI Agents in minutes.



### The Efficiency Gap

Trillions in capital are pouring into AI infrastructure. Firms that ignore this efficiency will see margins collapse.



### The "Barnes & Noble" Moment

Incumbents wake up late to disruption and panic-spend to catch up. Don't let your practice get "Amazoned".



### The Client Expectation

Clients now experience AI speed in every other aspect of life. They will not accept analog delays in their finances.

THE COUNTER-INTUITIVE TRUTH

# People Still Want the HU

AI does not replace the Advisor.  
AI replaces the **drudgery** so the Advisor can be **human**.

## The Bricklayer

Stuck in the manual labor of data entry, note-taking, and generic emails. Has no time for deep empathy.

## The Architect

Uses AI agents for the labor. Spends 100% of their time designing outcomes and connecting with the client.

## Future-Proof Your Practice

Fin-Tegration

Become indispensable.

### The "Architect's Blueprint" Implementation

We don't sell software. We help implement workflows that strip away the robotic tasks so you can double down on the HUMAN Element.



**Meeting Intelligence:** Be 100% present. Never take a note again.



**Deep Research:** Analyze portfolios in seconds, not hours.



**Hyper-Personalization:** Educational content tailored to every single client.

"If you don't implement this, they will go to someone who will."

Start the Conversation





AI PHILOSOPHY: THE "IRON MAN SUIT"

# AI doesn't replace the Master; It retires the Apprentice.

Flip the narrative. We don't build tools to replace veterans; we build "Institutional Memory" engines that allow the Old Guard to leverage their wisdom at infinite scale.

## 1 The Three Pillars of Indestructibility

### DIGITAL JUNIOR PARTNER

Gemini automates the drudgery—meeting notes, compliance logs, and data ingestion—so the Master only shows up for the handshake.

### INSTITUTIONAL MEMORY

Train private AI on 30+ years of the advisor's past writings. A digital twin that thinks, writes, and analyzes exactly like them.

### HYPER-PERSONALIZATION

Infinite CRM memory. Automatically scan news for client-specific triggers to draft high-touch, thoughtful outreach.

## 2 The "Invisible" Workflow

### 1 FRICTIONLESS INPUT

The Advisor speaks a voice memo or uploads a PDF. No complex dashboard training required. The technology remains invisible.

### 2 THE BLACK BOX (GEMINI)

The system cross-references the input with client portfolios and the advisor's historical "voice" to ensure brand consistency.

### 3 REVIEW & APPROVE

A ready-to-send draft hits the advisor's phone. One tap to approve. They look like a genius; the AI does the heavy lifting.

### ADVISORY IMPACT

100%

Voice Consistency (Digital Twin)

20+ hrs

Saved on "Junior Associate" Grunt Work

Zero

Technical Training Required

"Experience is the asset. AI is the scale."

DEPLOY WISDOM ENGINE





# The Whale Hunter Strategy

OPERATIONALIZING FLOW ACCELERATION

DISTRIBUTION MODEL:  
**Internal Battle Plan**

STRATEGY: KEY-ACCOUNT CONSULTING

## Land 5–7 New "Whales" Yearly. Stop Wholesaling. Start Consulting.

The difference between volume wholesaling and whale hunting is **intentionality**. We help you move from "product pitching" to becoming a Distribution Consultant who operationalizes growth for top-tier advisors.

### 1 The High-Conversion Levers

#### BOOK MINING

Analyze their book to flag clients where focus products fit (risk, income, tax drag).

#### CAMPAIGN DESIGN

Deliver turnkey email templates, review scripts, and client letters for specific strategies.

#### SCOREBOARDING

Weekly tracking of touches, meetings, and tickets tied to the product theme.

### 2 The GTM Sequence

#### A Intelligence & Warm Approach

Start with advisors already showing category interest. Use COIs (Key Accounts, OSJs) to vouch for the diagnostic.

#### B Diagnostic (Not a Demo)

Lead with a "Growth Diagnostic." Map where they are leaving money on the table. Promise a plan, not a pitch deck.

#### C The Pilot Phase

Run a 60–90 day pilot with a single product line. Convert to a core relationship once they see incremental flows.

#### WHOLESALE IMPACT

## 5-7

New Core Relationships / Year

## \$20-30MM+

New Opportunity Found Relationship

## 100%

Focus on Gross Inflows

*"Own the workflow, own the flows."*

**START WHALE DIAGNOSTIC**



SR. VICE PRESIDENT & FINTECH INNOVATOR

## Kosal Prum

Raising billions in assets through 23 years of consultative excellence.

***“AI won’t take your job. Somebody using AI will.”***

- ECONOMIST RICHARD BALDWIN

### The Future of Indispensable Advice

Kosal Prum is a high-performing Financial Services Executive with over two decades of experience driving nearly **\$5 billion in asset growth**. Specializing in the Upper Midwest markets, his career is defined by a disciplined, data-driven approach to territory management and consultative sales.

As the Founder of **Fin-Tegration**, Kosal bridges the gap between traditional relationship management and modern fintech efficiency. The future of financial services belongs to the 'Architects'—those who lead with empathy, leverage technology, in order to manage complexity. He implements the systems that protect your time, allowing you to remain the indispensable anchor for your clients in an increasingly digital world.

#### INSTITUTIONAL WISDOM

*"AI doesn't replace the Master; it retires the Apprentice. Experience is the asset—AI is the scale that makes **you** indestructible."*

### Ready to Accelerate Outcomes?

Connect with Kosal to modernize your practice and become indispensable to your clients.

[KOSAL@FIN-TEGRATION.COM](mailto:KOSAL@FIN-TEGRATION.COM)