HUMANITY LABS AI MAGAZINES

AI WORKFORCE JOURNAL

ISSUE NO. 4

The Work Before the Advice

IN THIS ISSUE

How one wealth management firm replaced hours of manual preparation with a single email

Partner stories from the Humanity Labs AI Workforce.

Welcome back to the *AI Workforce Journal*. Our first three issues followed the Humanity Labs AI Workforce through the back office and into the market. This issue is what happens once a single prospect is already in the room.

The firm in this issue is a wealth management firm where no advisor can recommend anything until the prospect's current portfolio has been rebuilt from the raw account statements of their prior firm. That rebuild ran up to six hours of keying per prospect, on a turnaround of up to four weeks. The analysis met the firm's standard every time. The hours and the weeks were just what it cost to get to the starting line.

Today, the team forwards one email and a standardized allocation analysis comes back the same day, for every advisor. The advisor's part is up to twenty minutes of review and validation.

That's the pattern we built Humanity Labs to deliver: defined work, run to the firm's own standard, with people deciding what to do with the capacity that comes back. This is what it looks like before the first recommendation is ever written. We hope you enjoy reading the story.

Warmly,

Dimple Shah
MD, Wealth | Humanity Labs
dimple@humanitylabs.ai · c 858-722-3423

THE RESULTS

By the numbers

THE WORKFLOW	Pre-sales prospect analysis, roughly five to ten prospects a week
THE INPUT	The prospect's raw account statements from their prior firm, in a single email
TURNAROUND	From a cycle of up to four weeks to the same day
ADVISOR TIME PER PROSPECT	From up to six hours of data entry to up to twenty minutes, down about 95 percent
THE STANDARD	One standardized allocation analysis, as an Excel workbook and PDF, for every advisor and prospect
THE ADVISOR'S PART	Every analysis is reviewed and validated by the advisor before any recommendation
THE HOURS	Returned to advisors, in front of prospects and clients

> **ABOUT THIS STORY**
>
> Details reflect a Humanity Labs partner firm in wealth management. The firm's identity is confidential.

The Work Before the Advice

How one wealth management firm replaced hours of manual preparation with a single email, and shortened the path to a recommendation.

Before a wealth advisor can recommend changes to a prospective client's investments, they need to understand what that person already owns. That means turning account statements into a portfolio analysis: a breakdown of the investments and how the money is allocated. The advisor uses that analysis to prepare their recommendations.

Up to six hours of keying by hand, before a single recommendation could be made.

At the wealth management firm in this story, producing that analysis required painstaking work. Advisors entered every holding from the statements into Morningstar by hand. A complex prospect could have roughly 800 holdings, requiring up to six hours of data entry. Advisors also built the allocation spreadsheet, converted it to a PDF, and pasted screenshots into a presentation.

The amount of manual work constrained the firm's capacity to prepare analyses. Each one required hours of advisor time before a recommendation meeting could take place. Including the wait to begin, the full process took up to four weeks.

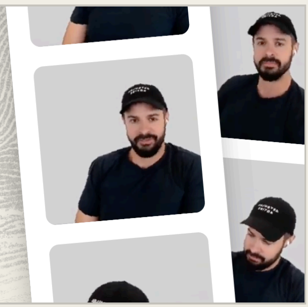
FROM HOURS OF DATA ENTRY TO ONE FORWARDED EMAIL

The firm now assigns the portfolio analysis to the Humanity Labs AI Workforce.

The team forwards an email with the prospect's account statements. The AI Workforce reads the statements, identifies and classifies the holdings, and returns the analysis in a standardized Excel workbook and PDF. The team receives it the same day.

The account statements that used to take up to six hours per prospect to key by hand.

"Now I just forward one email and the finished analysis comes back," the firm's operations team reports.



Advisors spend up to 20 minutes reviewing and validating the analysis and selecting the material they need. They remain responsible for deciding what to recommend. What has changed is the preparation: instead of entering the holdings and building the analysis themselves, they receive a completed work product to review.

THE PROSPECT ANALYSIS, BEFORE AND AFTER

Pre-sales prospect analysis at a Humanity Labs partner wealth management firm

Cycle	**UP TO 4 WEEKS TO SAME DAY**
Prep	*up to 6 hours to up to 20 minutes*
Volume	*roughly 5 to 10 analyses a week*

The output is also more consistent. Where the format once varied by advisor, everyone now receives the same comprehensive format, containing the analysis of that prospect's investments.

MORE CAPACITY TO ADVISE, AND TO WIN BUSINESS

This work matters because it prepares the firm for a consequential conversation: explaining to a prospective client what it recommends and why. Having the analysis sooner allows the advisor to move to that conversation sooner.

The recovered time now goes to advisors sitting with prospects and clients.

That is why the partner sees the change as more than an administrative improvement. The person championing the project inside the firm describes it as a way to help win business. It removes time-consuming preparation from the process of developing a new client relationship.

For advisors, the benefit is equally concrete. Hours previously spent entering holdings are now spent with prospects and existing clients. The firm can prepare an analysis without requiring the advisor to supply all the manual labor behind it.

The firm's capacity to pursue new business is no longer tied to how many hours its advisors can spend entering holdings by hand. The AI Workforce handles that preparation, giving advisors more time for the work that turns an analysis into a client relationship: explaining their recommendations, answering questions, and earning trust.

AI WORKFORCE JOURNAL

2026 BACK ISSUES

ABOUT HUMANITY LABS

Humanity Labs gives wealth management firms an AI Workforce that works inside existing systems to complete work across the front, middle, and back office, helping firms serve more clients without adding cost at the same rate. Every job strengthens a shared memory that builds the firm's Organizational General Intelligence (OGI). Humanity Labs works with leading firms overseeing more than $750 billion in client assets and is backed by Google Ventures and Vestigo Ventures.

Learn more at humanitylabs.ai

The *AI Workforce Journal* is a publication of Humanity Labs. Details in this story are real results from an existing Humanity Labs partner; the firm's identity is confidential.