



# ARE YOUR RELATIONSHIP MANAGERS READY FOR CLIENT CONVERSATION EXCELLENCE?



AdvisorSim helps financial institutions assess and strengthen advisor readiness through realistic AI-powered client simulations, configurable evaluation frameworks, and governance-focused oversight workflows.

## WHY FINANCIAL INSTITUTIONS CHOOSE ADVISORSIM



Assess real-world advisor readiness



Standardize onboarding and coaching workflows



Improve visibility into competency gaps



Practice realistic client conversations

## COMPETENCY BREAKDOWN BY PILLAR



Client Discovery & KYC



Suitability



Product Knowledge (KYP)



Client Interaction & Soft Skills

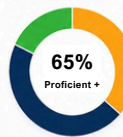
Transparent scoring across 30+ competencies with manager review and override capabilities.

## ADVISOR READINESS DASHBOARD

### Learner Performance

Overview of readiness and competency outcomes

#### Readiness Distribution



Emerging 35%  
Proficient 47%  
Advanced 18%

### Persona Difficulty Comparison

Persona	Difficulty
Michael Garcia	■ ■ ■ □
John Mitchell	■ ■ ■ □
Samanda Williams	■ ■ ■ ■

### Readiness Evolution Over Time



## KEY DIFFERENTIATORS



### CONFIGURABLE EVALUATION FRAMEWORKS

Align scoring and competency evaluation to your organization's products, policies, workflows, and internal standards.



### HUMAN-IN-THE-LOOP GOVERNANCE

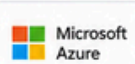
Combine AI-powered evaluation with human review workflows, auditability, and governance controls.



### MULTI-USE CASE DEPLOYMENT

- Wealth Management
- Sustainable Investing
- Alternative Assets
- Commercial Lending
- Insurance Relationship Management

## ENTERPRISE SECURITY & RESPONSIBLE AI GOVERNANCE



- ✓ Enterprise-ready infrastructure
- ✓ Privacy-conscious workflows
- ✓ Governance-focused evaluation processes
- ✓ LMS integration via SSO or LTI

EXPLORE HOW ADVISORSIM COULD SUPPORT YOUR DIVISION

BOOK A DEMO

EXPLORE PILOT PROGRAM

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