

## Alumni of HSBC Bank Unveils Financial AI Agent to Enhance Client Engagement



**London, United Kingdom Feb 27, 2024 ([Issuewire.com](https://www.issuewire.com))** - Former private wealth management professional from HSBC Bank and Partners of FTSE 100 St James' Place Wealth Management have today unveiled their pioneering solution: A multimodal, privacy-focused conversational AI Financial Agent, named Finley AI.

Developed and released by award-winning innovation and AI technology company INATIGO. This flagship solution is designed to revolutionise the fintech and finance sectors globally by delivering empathetic, instant financial insights and guidance in a natural, conversational style. Finley AI is poised to transform the way financial entities interact with clients, providing scalable, on-demand communication solutions that cater to the growing need for more personalised and accessible financial services in our digital-dominant era.

The collective expertise of the Finley AI team spans finance, technological innovation, and artificial intelligence. Finley AI benefits from the technological backing and support of industry giants such as Microsoft, Google, and NVIDIA. Finley AI merges sophisticated generative financial AI with robust data privacy and security measures. This fusion tackles the paramount issue of deploying generative AI in financial technology while safeguarding user data and privacy.

The financial industry's movement towards conversational AI solutions is shown by the rising demand for chat-enabled services. This demand is partly driven by financial institutions' need to surmount scalability challenges and offer instant client engagement. The introduction of advanced platforms like ChatGPT, which garnered 100 million users within two months, has escalated customers' expectations, urging businesses to deliver more interactive and immersive experiences. Leading financial organisations worldwide are leading this shift, adopting or developing financial generative AI solutions to better support their teams and enhance customer interactions.

Elemi Atigolo, a former private wealth manager employee at HSBC Bank, Partner of St James's Place Wealth Management and co-founder of Finley AI, remarked, "If having a website was essential for every firm in the early 2000s, and by 2008, every fintech needed an app, we are confident that by 2025, every company will require an AI agent. It was crucial for us to develop the Finley AI Agent with the advanced capabilities of generative AI, yet without compromising on user privacy. Finley AI equips financial institutions with the ability to provide sophisticated, accessible, and intuitive client engagement services, signifying a new chapter in the financial sector."

For financial entities aiming to stay at the forefront in this digital age, adoption of cutting-edge technologies is key. AI agents are critical in this evolution—autonomous, AI-driven systems capable of reasoning, analysing, and executing actions. These agents significantly enhance customer interactions, offer personalised experiences, and perform tasks efficiently.

Finley AI prioritises privacy and therefore incorporates strict data protection and security protocols, including PII redaction and content moderation. To mitigate and reduce AI-generated errors or 'hallucinations', Finley AI employs a network of trained experts, alongside advanced retrieval-augmentation techniques and technologies. The Finley AI Agent is available in two variants: FinleyX, with vision capabilities, providing up-to-the-minute financial data, and FinleyPro, designed for financial guidance, client engagement, and coaching conversations.

### Product Highlights:

- **Privacy and Security:** Implements strict PII redaction, financial frameworks, and guardrails.
- **Advanced Conversational Abilities:** Empathetic understanding and conversational AI for enhanced client engagement.
- **Built with regulatory and compliance support:** Developed with support from the UK's Financial Conduct Authority (FCA) Advice Unit for the deployment of financial AI chat and voice guidance models.
- **Trained in financial principles:** Trained to harness a broad understanding of financial

principles, our system delivers adaptable guidance suitable for varied circumstances.

The development of Finley AI has involved comprehensive research and collaboration, including working with regulatory bodies such as the FCA. This cooperation has facilitated the integration of regulatory standards directly into the Finley AI Agent, reinforcing its commitment to responsible and ethical AI development. This commitment was also evident in the success of the Finley AI Voice assistant, an earlier version of the current AI agent, which supported over 100,000 users worldwide during its initial research phase.

Atigolo has stated, “Our Finley AI agent is proficient in the domain of finance, equipped to offer detailed financial guidance and real-time market updates. It plays a crucial role in enhancing customer interactions, scaling services, and alleviating the burden on human workforces, allowing them to focus on more intricate tasks and scenarios. Finley AI represents an innovative tool for financial companies, combining cutting-edge technology with a focus on financial services to improve customer experiences while maintaining stringent privacy standards. As ex-finance professionals, AI developers and innovators, we are thrilled to guide the finance sector into this exciting new phase.”

To learn more about Finley AI, please visit: [www.finleyai.com](http://www.finleyai.com)

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