AI Business OS

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FINANCIAL SERVICES · WORKFLOW

Quarterly report generation

Automatically generates comprehensive quarterly performance reports for client portfolios by pulling data from multiple systems, analyzing performance, and delivering personalized reports to clients and advisors.

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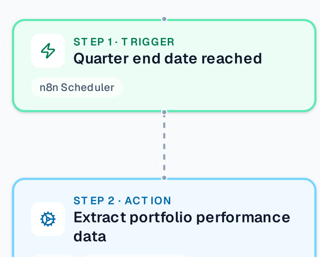
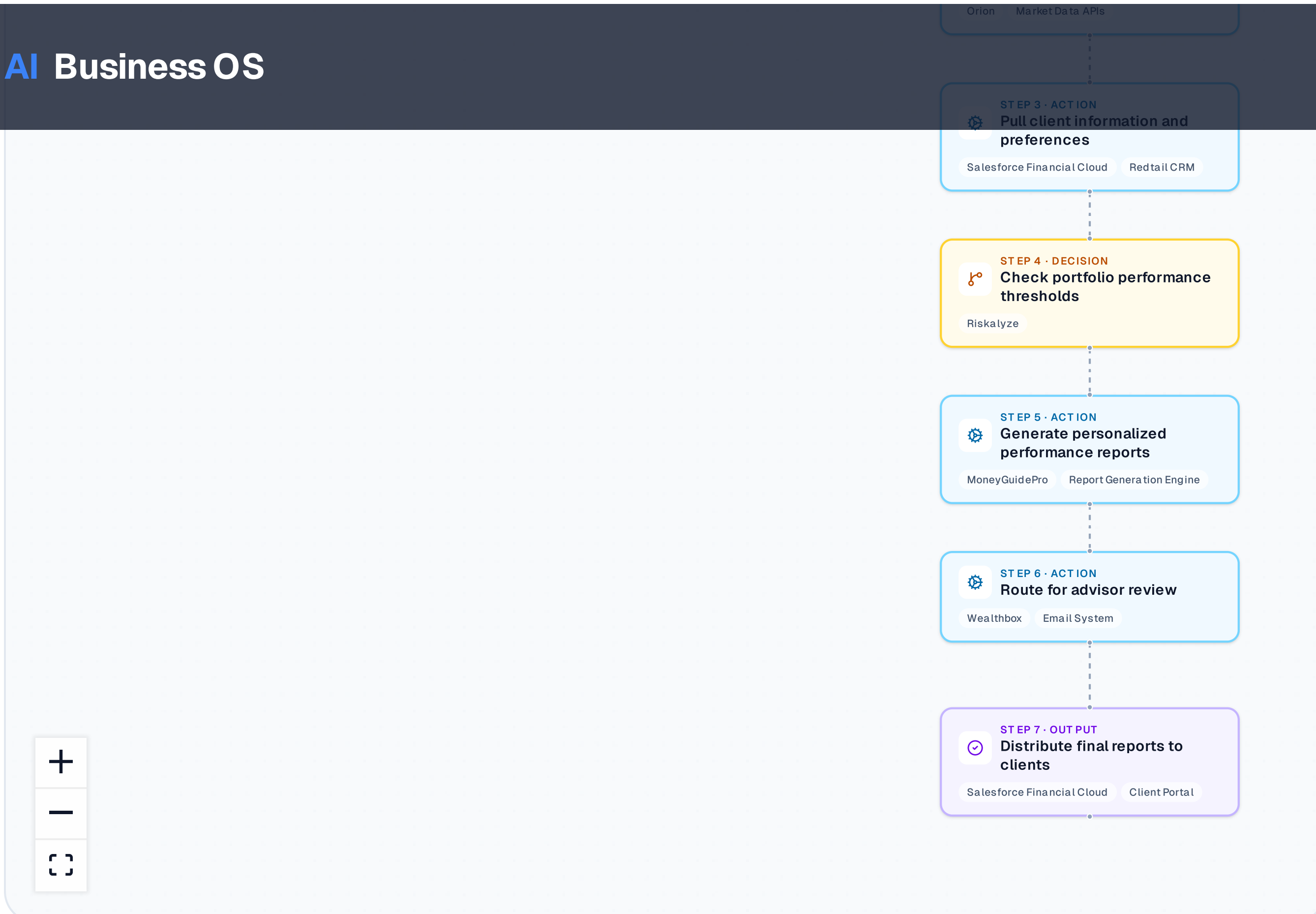
WORKFLOW TRIGGER

End of quarter date arrives (March 31, June 30, September 30, December 31)

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

TRIGGER

Quarter end date reached

Workflow automatically initiates on the last day of each quarter. System identifies all active client portfolios requiring quarterly reporting.

n8n Scheduler

2

Extract portfolio performance data

Retrieves current portfolio holdings, transactions, and performance metrics for all clients from portfolio management system. Gathers market data and benchmark comparisons for the quarter.

Orion · Market Data APIs

3

ACTION

Pull client information and preferences

Fetches client contact details, communication preferences, and custom reporting requirements from CRM system. Identifies clients requiring special reporting formats or additional analysis.

Salesforce Financial Cloud · Redtail CRM

4

DECISION

Check portfolio performance thresholds

Evaluates if portfolio performance falls outside acceptable risk parameters or client expectations. Flags accounts requiring advisor review before report distribution.

Riskalyze

5

ACTION

Generate personalized performance reports

Creates customized quarterly reports with performance charts, asset allocation analysis, and commentary. Incorporates client-specific goals and risk tolerance into narrative.

6

ACTION

Route for advisor review

Delivers flagged reports to appropriate advisors for review and approval before client distribution. Auto-approves reports meeting all performance criteria.

Wealthbox · Email System

7

OUTPUT

Distribute final reports to clients

Sends approved quarterly reports to clients via their preferred communication method (email, client portal, or mail). Updates CRM with delivery confirmation and schedules follow-up activities.

Salesforce Financial Cloud · Client Portal

Outputs

- Personalized quarterly performance reports
- Advisor review queue for flagged accounts
- Client delivery confirmations and follow-up tasks

Key Metrics

- Report generation time reduction
- Advisor review cycle time
- Client satisfaction scores

Tools & Integrations

- n8n Scheduler
- Orion
- Market Data APIs
- Salesforce Financial Cloud
- Redtail CRM
- Riskalyze
- MoneyGuidePro
- Report Generation Engine
- Wealthbox
- Email System
- Client Portal

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Actionable AI implementation strategies for business leaders ready to transform their operations.

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