



IMAP AI Webinar

19th Feb 2023

by



FIFTH LOGIC

Driven By Challenges, Powered By Solutions



About Us



James Wartho
CEO/Founder



AI in Financial Advice – Capture conversations with clients to create file notes to compliance deliverables making advice cheaper, faster and safer



FIFTH LOGIC

Driven By Challenges, Powered By Solutions

Consulting – AI and technology transformation strategy, architecture, programme delivery, development, implementation, AI-DataScience to clients including ASX, APRA, Macquarie, AMP, Aware Super etc.

AI Background

- ▶ Enormous attention since OpenAI released ChatGPT in Nov 22 – Bigger than dot com??
- ▶ However, AI and machine learning has been around since the 1950s conceived by Alan Turing (Enigma fame)

So What's Changed?

- ▶ Compute power x 10,000 in last 20 years
- ▶ Budgets - Open AI have raised US\$11.3B to develop ChatGPT. Last week Sam Altman (Open AI CEO) said he wants to raise US\$7T to develop new chips

What is Chat GPT from Open AI

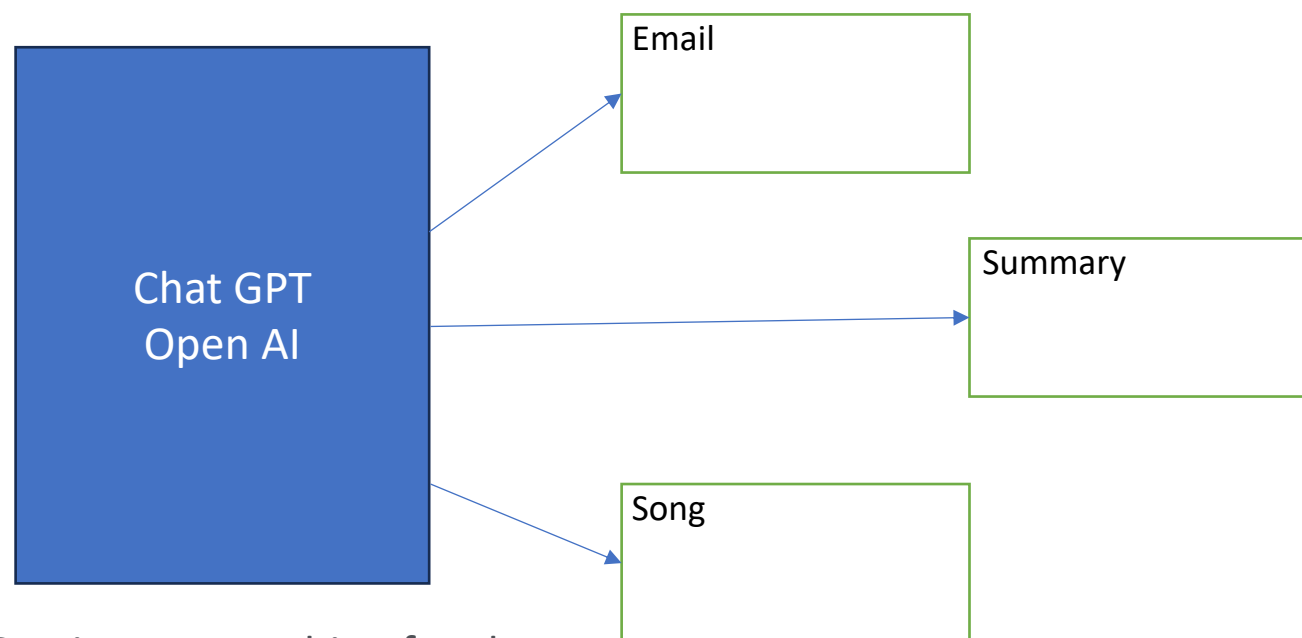
ChatGPT is a large language model (LLM) created by Open AI in Silicon Valley

Ask a Question or set a task?

Write me an email to cancel my TV subscription

Summarize this news article in 200 words

Write a song about the IMAF conference

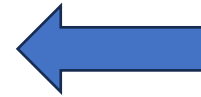


ChatGPT is an AI machine for chat conversations, gaining insights and automating tasks

How are large language models (LLM's) created?

Training Data

- The cat sat on the mat
- The cat laid on the mat
- The cat sat on the mat



Question

- Complete the sentence
- "The cat..."



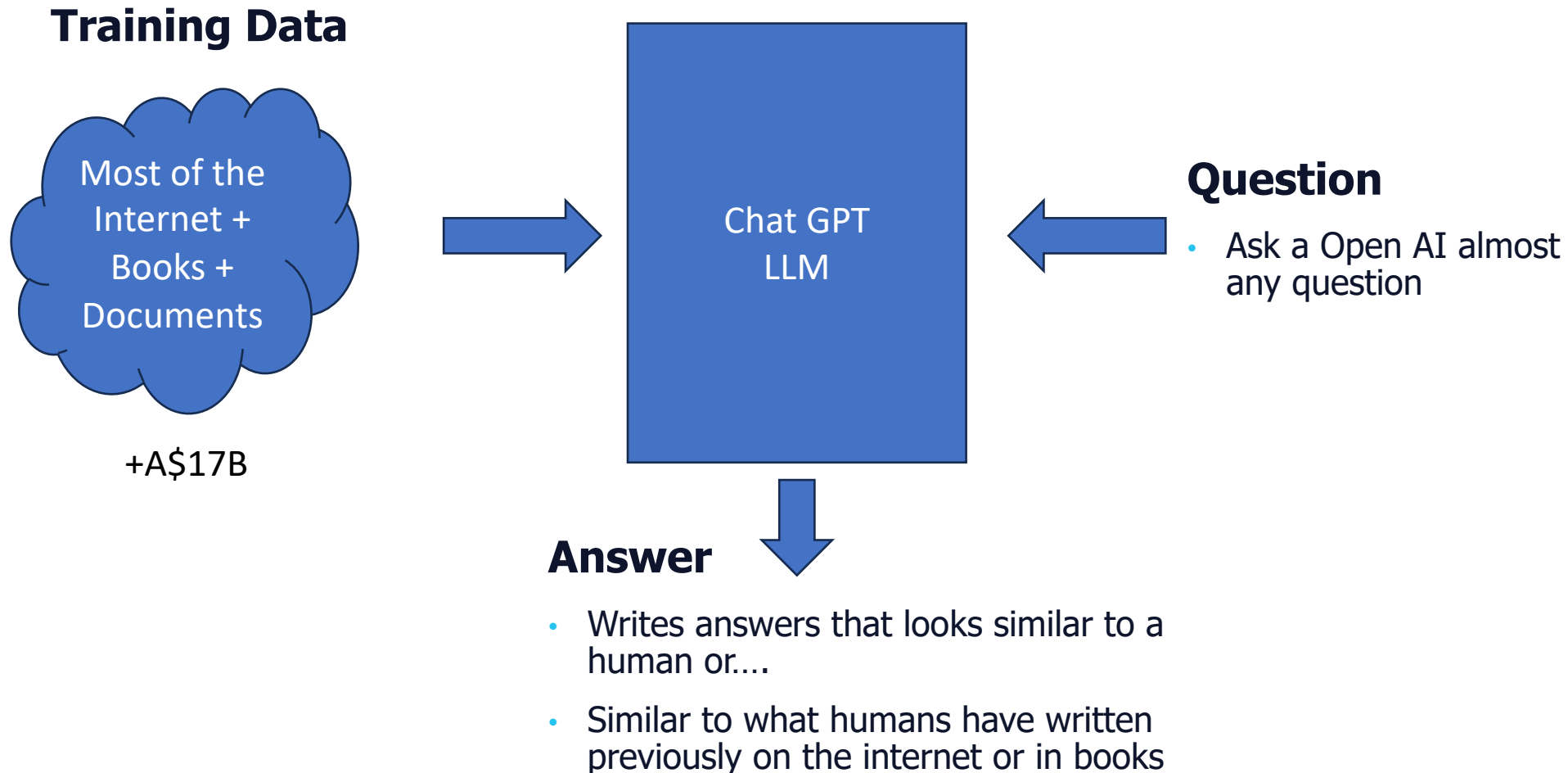
Answer

- "The cat sat on the mat" (66% sure)

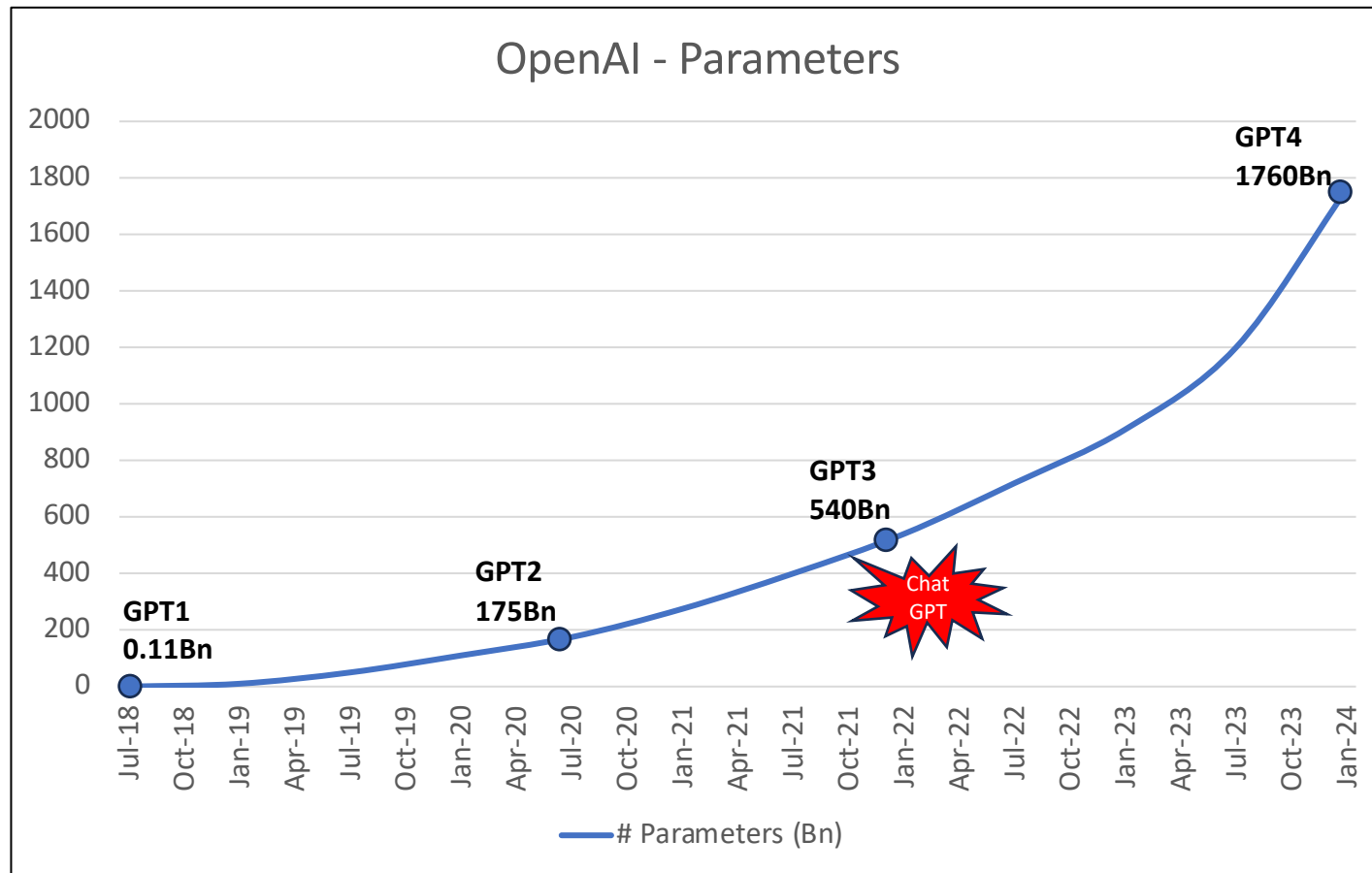
Same process for:

- Images
- Transactions
- Voice Conversations

How was ChatGPT created? Train on a massive scale!



How fast are LLM's developing?



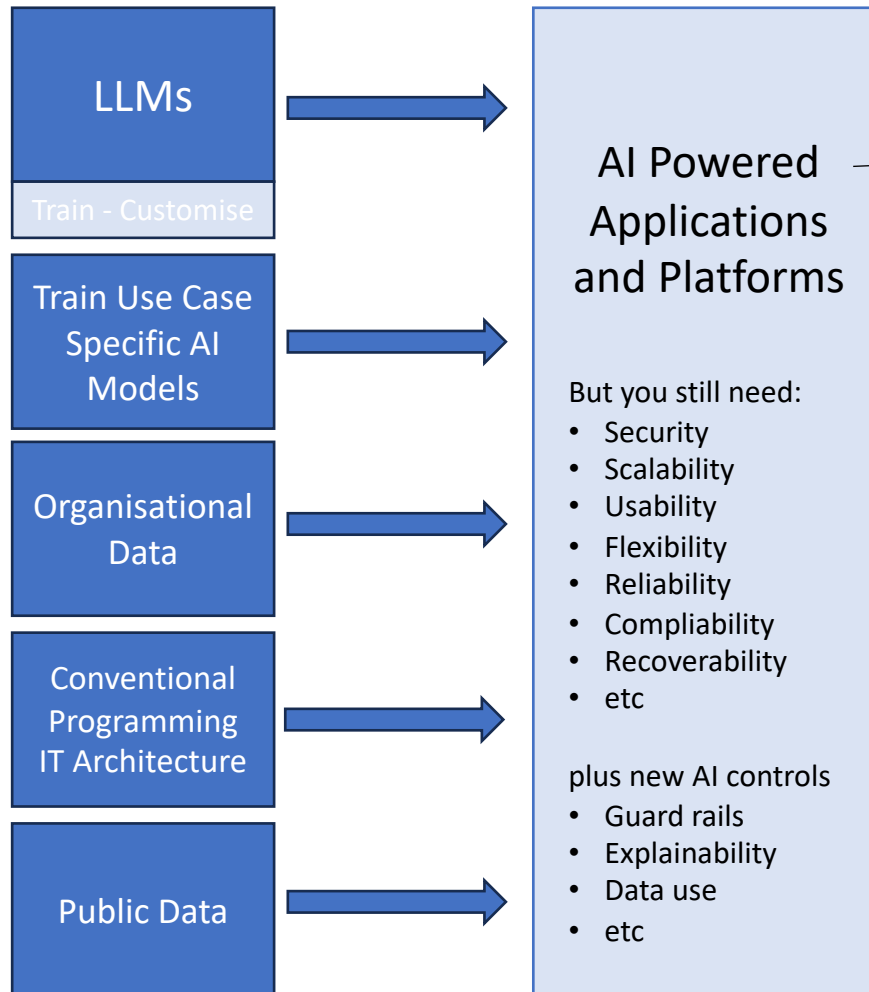
Capability Increase

- Bigger questions
- More complex questions
- Better answers
- More consistent answers

Other Big Players

- Google – Gemini
- Facebook Llama
- Microsoft (Funding OpenAI)
- Apple – Where are they?

What can we do with this technology?



It is now possible to build software that 3-5 years ago could only be dreamt about.

AI Apps can:

- Do administration
- Analyze Data
- Create Content
- Help comply
- Help with Decision Making
- And much more

Make it cheaper, faster and safer to be a Financial Adviser - make it fun again!

FinTalkr

Call List

Call List

Call List

New Meeting

Filenote

Sentiment

Client Management

Audio Upload

Home > Call List

Meeting Summary

Search or filter results

Select	RecordingId	Adviser	Client	Start	Duration	Date	Call Type	Sentiment	Action
☒	1001889	james@test.com	Fred Flintstone	11:34 00	00:23:31	18-02-2024	Ad-hoc review	34	Call Detail
☐	1001888	james@test.com	James Bond	11:26 34	00:02:26	18-02-2024	Annual review	18	Call Detail
☐	1001885	james@test.com	Camila A	15:56 23	00:02:22	16-02-2024	Annual review	9	Call Detail
☐	1001856	james@test.com	James Bond	15:44 19	00:03:03	14-02-2024	Annual review	9	Call Detail
☐	1001830	james@test.com	Sarah Cass	16:04 22	00:03:24	07-02-2024	Prospect 1st appointment	49	Call Detail
☐	1001829	james@test.com	James Bond	15:45 07	00:08:05	12-02-2024	Annual review	15	Call Detail
☐	1001825	james@test.com	James Bond	12:45 34	00:00:07	12-02-2024	Ad-hoc review	65	Call Detail
☐	1001824	james@test.com	James Bond	12:02 26	00:17:27	12-02-2024	undefined	23	Call Detail
☐	1001817	james@test.com	James Bond	15:19 22	00:01:28	09-02-2024	Annual review	8	Call Detail
☐	1001816	james@test.com	James Bond	15:16 50	00:00:35	09-02-2024	Annual review	0	Call Detail
☐	1001814	james@test.com	Sarah Cass	12:59 37	00:03:24	05-02-2024	Ad-hoc review	49	Call Detail
☐	1001811	james@test.com	James Bond	12:47 51	00:08:16	09-02-2024	Annual review	18	Call Detail
☐	1001806	james@test.com	James Bond	09:32 31	00:26:26	09-02-2024	Annual review	8	Call Detail

Contact Us



James Wartho
CEO/Founder

P: +61 2 8078 6955
E: jwartho@fifthlogic.com
A: Lvl 24, Three International Towers,
300 Bangaroo Ave, Sydney,
NSW 2000, Australia
W: fintalkr.com or fifthlogic.com



Ash Jeffs
CTO/Co-Founder

P: +61 2 8078 6955
E: ajeffs@fifthlogic.com
A: Lvl 24, Three International Towers,
300 Bangaroo Ave, Sydney,
NSW 2000, Australia
W: fintalkr.com or fifthlogic.com