RIA EDGE · TECH FOR GROWTH SUMMIT · OCTOBER 20, 2026

Who Signs Off?

AI at the core, one year later

Erica Landry

Chief Marketing Officer, SoftPak Financial Systems

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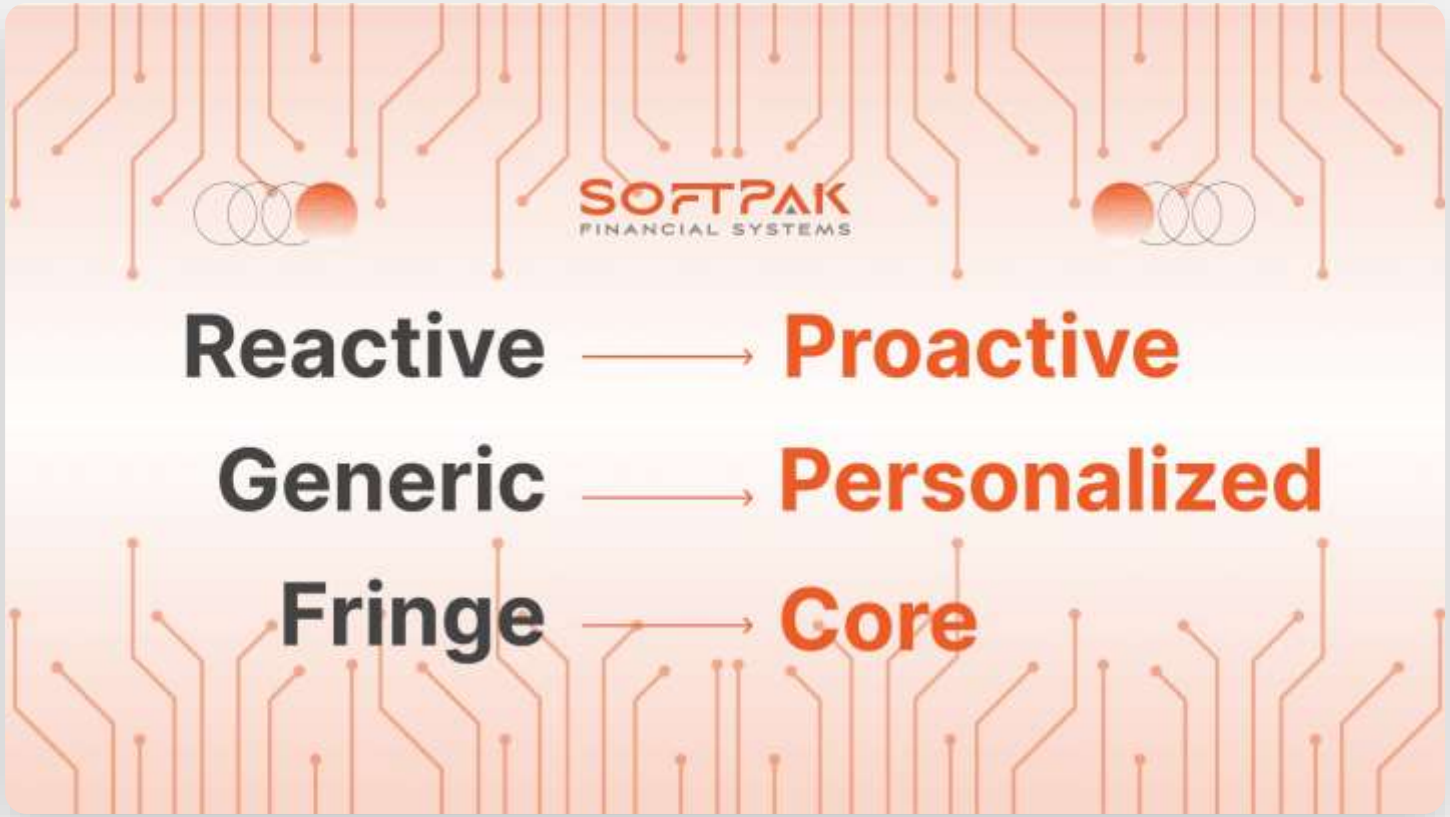
OCTOBER 2025

One year ago, on this stage



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THE 2025 ARGUMENT

The edges are useful. The work was elsewhere.

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Where the money moves…

THE FRINGE

Useful, around the work

- Meeting notes
- Follow-up emails
- Document summaries

THE CORE

Where the fiduciary promise lives

- The rebalance
- The tax impact
- The trade

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SINCE THEN

AI has finally caught up with our product aspirations.

The frontier labs now build for our industry on purpose.
Now there are ten ready-made agents for financial services.

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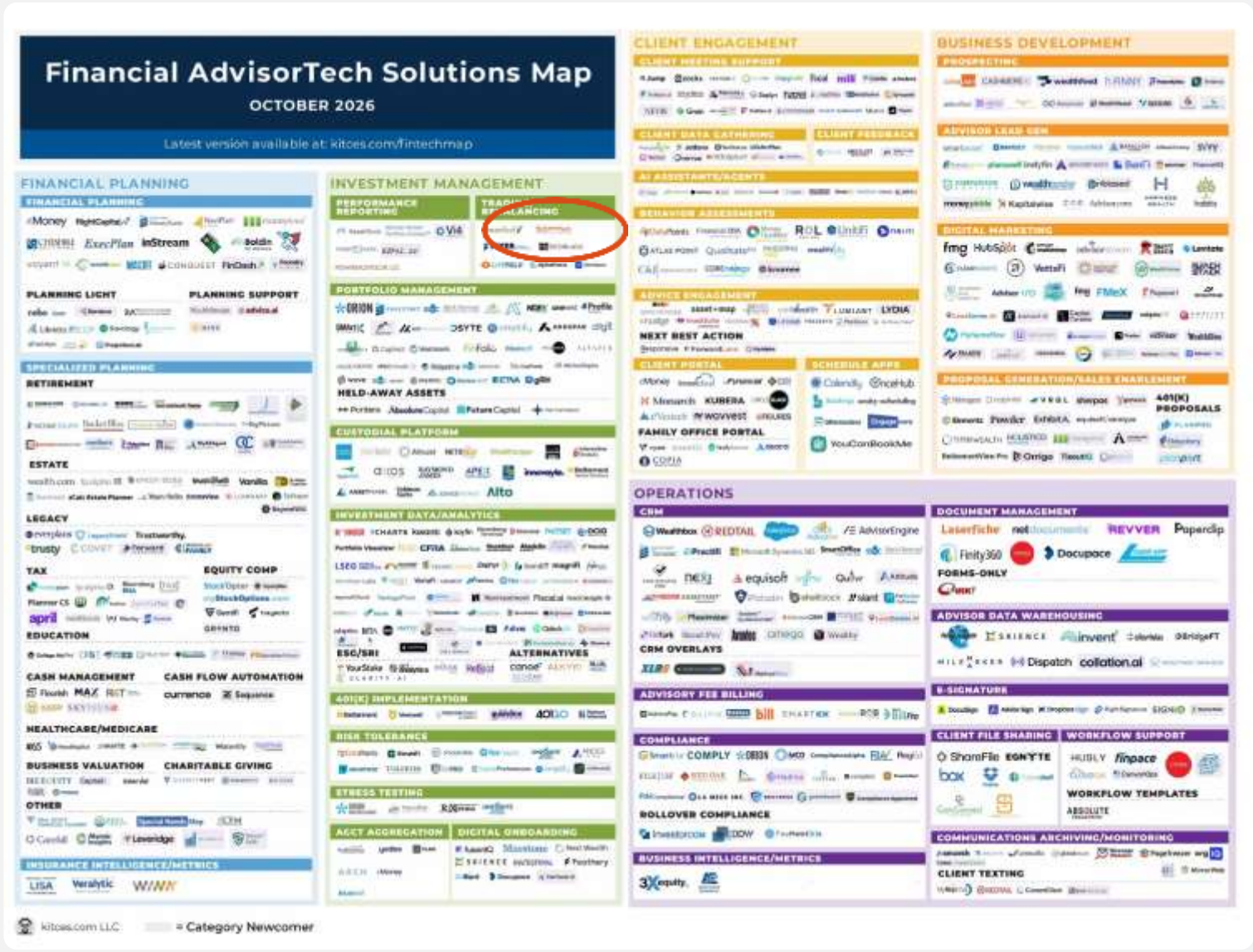
A dizzying map

Hundreds of providers, each owning a small piece of the puzzle.

We're one of them, in Trading and Rebalancing.



Source: Kitces AdvisorTech Map, October 2026

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Technologically ambitious...

and

Conservatively careful.



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You are the front line for your clients' savings, and their trust in you.

That pause before adopting something new is your job working the way it's supposed to.

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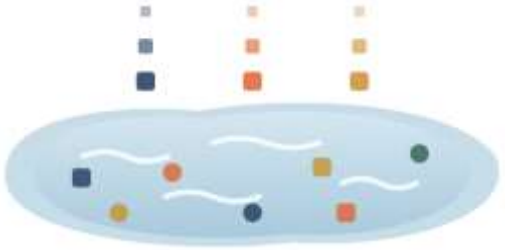
SOFTPAK PORTFOLIO INTELLIGENCE

THE CORE ENGINE



DATA LAKE

- REBALANCING
- TRADING
- PERFORMANCE
- REPORTING
- BILLING
- MODELS

LOGIC & DATA

EXECUTES APPROVAL

LLM

Reasoning and language

Claude, ChatGPT or the model of your choice

AI AGENTS

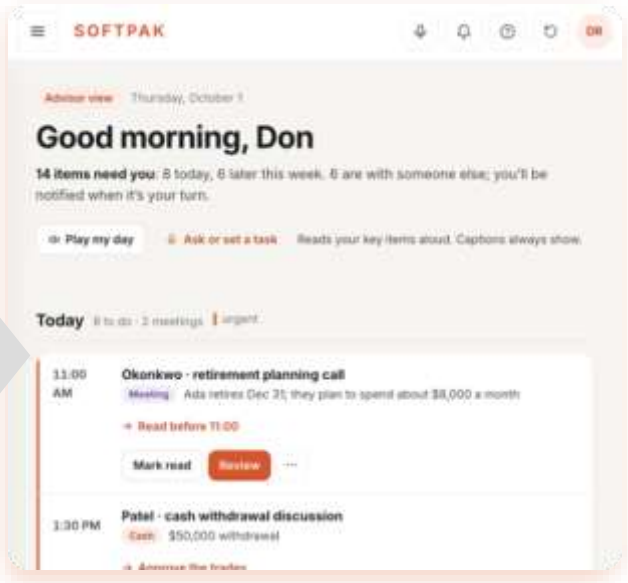
- Agent 1
- Agent 2
- Agent 3
- Agent N

PROPOSALS AND ANALYSIS

YOUR APPROVAL

PERSONALIZED DASHBOARD

YOUR WORKSPACE



- Rebalancing
- Reporting
- Billing
- Trading

RIA EDGE 2025

“If it can’t explain its answers, then don’t trust it.”

SoftPak Portfolio Intelligence is our answer.

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Two sacred goals

1

Keep control in your hands

Nothing executes without your approval. Every action logged, every role set by your firm.

2

Strengthen your client relationships

Every explanation, report and insight is built to deepen your clients' trust in you.

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Your firm runs on six systems.

Planning, rebalancing, CRM, reporting, tax and billing. None of them talk to each other.



Early access
January 2027
Booth #30

Illustrative data · fictional households

WHAT THE WRAPPER HELPS YOU SAY

“We trimmed this position, so your granddaughter’s college fund is on track for next fall.”

That’s advice. And it’s yours.

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TUESDAY

6:40 a.m.

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OVERNIGHT

The work is done

Drift found, losses harvested, a wash sale caught, every trade explained, on rules you set.

AT YOUR DESK

Six decisions wait for you

Routine trades batched for one approval. You read the explanations, make the calls, and sign off.

THEN

You call Margaret

And wish her a happy seventieth.

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Who signs off?

You do.

And the time AI gives back goes to being there for the people who trust you.

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SOFTPAK PORTFOLIO INTELLIGENCE

Join the beta

A proven core, an AI wrapper, and you holding the pen.

Erica Landry

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