Amp Up Your AI

AI STARTER KIT

Your complete guide to implementing AI in your practice — starting this week

✥ 4-Week Quick-Start Checklist

Week 1 — Audit

- ■ Track your time for 3 days
- ■ Identify your top 3 time drains
- ■ Sign up for Claude.ai and Otter.ai
- ■ Run your first AI prompt (template inside)

Week 2 — Implement

- ■ Set up meeting transcription workflow
- ■ Build your first 5 prompts
- ■ Draft one client email with AI
- ■ Time yourself — compare before vs after

Week 3 — Systematize

- ■ Create your personal prompt library
- ■ Automate one CRM workflow
- ■ Train on Perplexity for prospect research
- ■ Document your new AI workflow

Week 4 — Optimize

- ■ Measure total time saved
- ■ Share one win with a colleague
- ■ Add 2 more tools to your stack
- ■ Plan your Month 2 AI roadmap

✥ 5 Vetted AI Tools

Claude (claude.ai)

Client emails, meeting notes, content drafting. Best-in-class writing quality.

Otter.ai
Automatic meeting transcription. Syncs with Zoom, Teams, Google Meet.

Perplexity
AI-powered prospect research. Get a full brief in 2 minutes.

Zapier
Connect your CRM to everything. Automate repetitive data entry.

Notion AI
SOPs, onboarding docs, internal knowledge base. Your team in a box.

✦ 10 Copy-Paste Prompts

1. Client Meeting Prep

> Write a meeting prep brief for [Client Name], a [age/profile] client. Last meeting: [summary]. This meeting focus: [topic]. Include: key talking points, potential concerns, and suggested follow-up actions.

2. Meeting Follow-Up Email

> Write a warm, professional follow-up email to [Client Name] after our meeting today. We discussed: [topics]. Action items: [list]. Tone: reassuring and clear.

3. Quarterly Check-In

> Draft a quarterly check-in email to [Client Name]. Portfolio is [up/down X%]. Key message: [message]. Keep it under 150 words, conversational tone.

4. Prospect Research Brief

> Research [Prospect Name] who works at [Company]. Find: career background, estimated net worth indicators, likely financial concerns, and conversation starters.

5. LinkedIn Post

> Write a LinkedIn post about [topic] for an audience of independent financial professionals. Hook first sentence. 150 words max. End with a question.

6. Client Newsletter

> Write a 200-word client newsletter section on [market topic]. Tone: calm, educational, reassuring. Avoid jargon. End with one action item for clients.

7. Referral Request

> Write a natural, non-pushy email to [Client Name] asking if they know anyone who might benefit from financial planning. Keep it personal and brief.

8. New Client Welcome

Write a warm welcome email for [New Client Name] who just signed on. They care about [goals]. Make them feel confident in their decision.

9. CRM Note Summary

Summarize this meeting transcript into a CRM note: [paste transcript]. Format: Date, Attendees, Key Discussion Points, Action Items, Next Meeting.

10. Social Proof Request

Write a brief, friendly email to [Client Name] asking for a testimonial or Google review. Make it easy — suggest they mention [specific result].

12+ hours saved per week	$0 in new headcount	4 weeks to full implementation