



Orchestrator AI

The AI assistant for UK financial advisers

BROCHURE

Your practice, with the admin handled.

Installed on your own machine. Drafts, never sends. Built for UK advice firms.

Advisers spend most of the week on everything around the advice: the chasing, the filing, the preparing. Orchestrator takes that part. It works inside the tools you already use, reads what you already have, years of client emails, documents, and notes, and turns it into prepared mornings, drafted follow ups, and a client file that keeps itself complete. Nothing is uploaded to anyone's cloud, and nothing is ever sent without you.



Meeting prep, done overnight

A one page brief for every meeting: history, held positions, open actions, and the concerns your client actually raised, drawn from your own correspondence and ready before you sit down.



Follow up in your tone

After the meeting, the letter and the actions are drafted the way you write. You review, adjust, and send. The file note writes itself alongside, on the day, not on Friday.



Ask your inbox anything

Plain English search across years of client history. 'What did she say about the holiday home?' finds the thread however it was phrased, with the source message one click away.



Triage that thinks

Provider statements filed, urgent client notes surfaced, noise set aside, all before you have opened your first email. The morning starts with the pile that actually needs you.



A record of everything

Every action is logged with dates and sources, designed to support Consumer Duty evidencing. The trail builds as a by product of the work, so oversight is a report, not a project.



Drafts, never sends

Orchestrator prepares; you decide. No message leaves your machine without your review, and no client sees anything you have not read. The adviser stays the adviser.

Try it on your own inbox, free for 7 days.

No card required. Download, install, and the trial starts on its own.

orchestratorlab.ai · sales@orchestratorlab.ai