



Edge installed AI for the advice firm.

For principals, compliance officers, and IT reviewers.

The problem

An adviser's most complete client record is their correspondence: years of emails, documents, and meeting notes. Almost none of it is usable. Standard search matches words rather than meaning, filing depends on discipline, and the evidencing burden of Consumer Duty falls on exactly the hours firms do not have. Cloud AI tools answer this by asking firms to upload the client record to third party infrastructure, replacing an admin problem with a data governance one.

The approach

Orchestrator inverts the model: the software comes to the data. It installs on the adviser's own machine, indexes the mailbox and files locally, and performs its work there. Client data is not uploaded to Orchestrator, and Orchestrator operates no cloud store of client information. The portal at orchestratorlab.ai exists for licensing, billing, and downloads only. The result is the leverage of modern AI over the firm's own record, with none of the transfer, retention, and access questions that follow a client file into somebody else's cloud.

Operating principles



Edge installed

Indexing and processing happen on the firm's own machine. The client record never leaves the building to be understood, and there is nothing to hand over.



Drafts, never sends

Every outbound communication is produced as a draft for adviser review. There is no autonomous send path, so nothing reaches a client unread.



Logged by design

Each action is recorded with timestamps and sources, so the evidence trail accrues as a by product of the work rather than as a separate exercise.



Seat licensed

Licences are issued per computer against the firm's plan, managed in the client portal, reissued in one click, and revocable at any time.

Capabilities



Meeting preparation

A one page brief assembled from the firm's own correspondence: relationship history, open actions, and the concerns recently raised. Preparation falls from an hour of searching to minutes of reading.



Follow up drafting

Correspondence drafted in the adviser's own tone, with a same day file note and captured actions. The record lands on the file at the moment of the work, not at the end of the week.



Plain English client search

Advisers ask questions the way they think and receive the relevant passages from years of history, with the source message one click away. Retrieval replaces reconstruction in meetings, reviews, and file checks.



Morning triage

Provider statements and routine confirmations are filed against the right client without passing through the adviser's attention. Genuinely urgent items are surfaced with context. The inbox opens sorted.



Consumer Duty evidencing

Because filing, notes, and logging happen at the moment of the work, the client file stays contemporaneous and complete. When files are sampled, the answer to 'show me' is a search, not an afternoon of archaeology.



Data handling

Processing and the index stay on the firm's machine. Orchestrator's servers hold account, licensing, and billing data only. Card details are held by Revolut and never touch Orchestrator systems.

Deployment

1

Download and install

Minutes on the adviser's machine. No server to provision and no migration project.

2

It indexes locally

The mailbox and files are read and indexed on that machine. Nothing is uploaded.

3

Trial starts on its own

Seven days, no card and no key. Apply a licence when the firm decides to continue.

Licensing and commercials

Solo

1 adviser

£49/mo billed annually · £588/year

£59 month to month

Standard

Up to 5 advisers

£200/mo billed annually · £2,400/year

£240 month to month

Premium

Up to 10 advisers

£300/mo billed annually · £3,600/year

£360 month to month

Larger firms on custom terms. Prices exclude VAT; no VAT is currently charged. Annual billing includes two months free. Subscriptions cancel any time from the portal, with access running to the end of the paid period and invoices available in the account.

Orchestrator gives an advice firm the leverage of AI over its own client record, without that record ever becoming someone else's asset.

orchestratorlab.ai · sales@orchestratorlab.ai · free 7 day trial, no card required