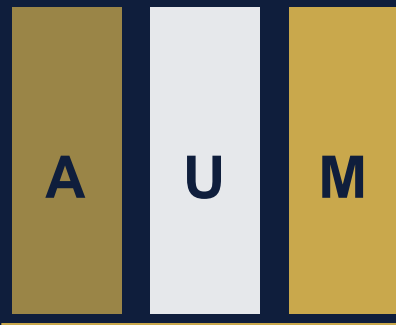


AMP UP MY AI
FREE RESOURCE GUIDE

Starter Kit

The exact tools, prompts, and workflows wealth advisors need to save 12+ hours a week — starting today.

www.ampupmyai.com



Amp Up My AI

AI CONSULTING FOR FINANCIAL PROFESSIONALS

www.ampupmyai.com

✓ 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 AI Tools for Your Practice

Tool	Plan	Best For
Claude.ai	Free / \$20	Client emails, meeting notes, content drafting. Strong option for nuanced writing tasks.
Otter.ai	Free / \$17	Automatic meeting transcription. Syncs with Zoom, Teams, Google Meet.
Perplexity	Free / \$20	AI-powered prospect research. Get a full brief in 2 minutes.
Zapier	Free / \$20	Connect your CRM to everything. Automate repetitive data entry.
Notion AI	Free / \$10	SOPs, onboarding docs, internal knowledge base. Your team in a box.

✓ 5 Copy-Paste Prompts

1. Client Email Draft

Write a warm, professional email to [CLIENT NAME], a [AGE]-year-old client with [PROFILE]. Topic: [TOPIC]. Tone: reassuring and clear. Under 150 words.

2. Meeting Follow-Up

Based on these meeting notes: [PASTE NOTES] – write a follow-up email summarizing what we discussed, key decisions made, and next steps. Professional but warm tone.

3. Quarterly Check-In

Write a quarterly check-in email for [CLIENT NAME]. Their portfolio is [UP/DOWN X %]. Key message: [MESSAGE]. Keep it under 120 words, conversational.

4. Meeting Prep Brief

Create a meeting prep brief for my meeting with [CLIENT NAME]. Last meeting: [SUMMARY]. This meeting agenda: [TOPICS]. Include: talking points, potential concerns, suggested follow-ups.

5. Welcome New Client

Write a warm welcome email for [CLIENT NAME] who just signed on. They care most about [GOALS]. Make them feel confident and excited about working together.