

# Intelligent Automation Enablement for Advice Firms - Done Right

AI is rapidly entering advice businesses by automating notes, workflows and admin. But without operational expertise, AI only captures what happened. It doesn't interpret, validate, or ensure it improves how your business actually runs. **That's where VBP is different.**



## The Insight Layer Between AI and Real Operations

We combine intelligent automation with deep financial services expertise to ensure technology delivers real outcomes, not just faster admin.

Our approach brings together **AI, machine learning and human-in-the-loop oversight** to create systems that don't just automate tasks, but continuously learn, adapt and improve. Embedded within your advice workflows, our model is supported by experienced specialists who:

- Validate outputs
- Apply context and judgement
- Ensure compliance and accuracy
- Continuously optimise performance

Because in advice, automation without oversight isn't efficiency. It's risk.

## Built for Advice. Designed for Control.

Unlike many AI solutions, VBP is designed to work within the realities of financial services.

- **Technology stack agnostic:** we integrate into your existing systems, not replace them
- **Your data stays in your environment:** no extraction, no duplication, no additional risk layer.
- **Secure, compliant and auditable by design:** aligned to how advice businesses operate. We are bespoke in our approach.

This ensures you can adopt AI and automation without compromising control, security or compliance.

## Where Intelligent Automation Actually Creates Value



### Remove Manual Bottlenecks

Automate repetitive workflows across advice, accounting and admin: reducing turnaround times from days to minutes.



### Improve Accuracy and Consistency

AI handles the process. VBP team members are trained to validate the output: ensuring every client receives a consistent, compliant, A-grade experience.



### Scale Without Adding Headcount

Free up your team from low-value tasks and redeploy them into client-facing, revenue-generating work.



### Measurable Impact, Not Just Activity

Our clients don't just automate tasks, they reliably transform true adviser capacity.

**758 hrs**  
Monthly Save

**\$25K**  
Monthly Cost Saving

**\$300K**  
Annual Forecast Savings

**Faster delivery cycles and consistent client experiences**

## Active Management. Not Set-and-Forget Bots.

Most automation solutions stop at deployment. We don't.

Our team continuously monitors, refines and improves your automations to ensure they evolve with your business, not become outdated workflows. This is how we ensure automation continues to deliver value long after go-live.

## Why VBP

- ✓ Built specifically for financial advice businesses
- ✓ Human-in-the-loop QA for every critical workflow
- ✓ Technology-agnostic and system-integrated
- ✓ Data remains entirely within your environment
- ✓ Backed by operational expertise > not just automation capability



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For more information visit our website: [www.vbp.au](http://www.vbp.au)

# VBP BOTS READY TO BE ADDED TO YOUR BUSINESS



Bot Type	Key Activities Performed	Efficiency Examples	Main Systems
<b>Bot 1</b> <b>Accounting:</b> ITR Engagement process	<ul style="list-style-type: none"> <li>Automate steps involved in preparing the completion of ITR's in XPM</li> <li>This will trigger sending of an ITR engagement email to clients, with email content customized based on previous years ITR document</li> </ul>	<p><b>84% Efficiency</b></p> <p>From 45min manual effort to only 7min robot processing time/task</p> <p><i>***Ave 95 hours/mo saved = 0.6 FTE, this is dependent on client schedule and volume</i></p>	XPM Outlook
<b>Bot 2</b> <b>Accounting:</b> ATOMate Document Processing	<ul style="list-style-type: none"> <li>Automate the current workflows in ATOMate</li> <li>Significantly accelerate the process of checking and emailing documents from the Review Queue portal.</li> </ul>	<p><b>60% Efficiency</b></p> <p>From 20min manual effort to only 8min robot processing time/task</p> <p><i>***Ave 120 hours/mo saved = 0.7 FTE, this is dependent on client schedule and volume</i></p>	ATOMate FYI
<b>Bot 3</b> <b>Accounting:</b> BAS Reporting	<ul style="list-style-type: none"> <li>Automation fr reconciling/ cash coding LOC transactions</li> <li>Invoices based on the documents extracted on FYI vs XERO</li> </ul>	<p><b>67% Efficiency</b></p> <p>From 15min manual effort to only 5min robot processing time/task</p>	XPM FYI Xero-Blue Foxit
<b>Bot 4</b> <b>Accounting:</b> CAS360 Address Change and Annual Review	<ul style="list-style-type: none"> <li>Automate sending of notification to update processes for any impacted client documents.</li> <li>Annual Review: automated sending of ASIC Annual Company Statement</li> </ul>	<p><b>50% Efficiency</b></p> <p>From 20min manual effort to only 10min robot processing time/task</p> <p><i>***Ave 7 hours/mo saved = 0.04 FTE, this is dependent on client schedule and volume</i></p>	CAS360
<b>Bot 5</b> <b>Financial Planning:</b> Insurance renewal Notification -Emails	<ul style="list-style-type: none"> <li>Automate sending of Insurance renewal notices for TAL &amp; Zurich policies</li> </ul>	<p><b>73% Efficiency</b></p> <p>From 30min manual effort to only 8min robot processing time/task</p> <p><i>***Ave 29 hours/mo saved = 0.17 FTE, this is dependent on client schedule and volume</i></p>	Insurance Platforms XPlan
<b>Bot 6</b> <b>Financial Planning:</b> Annual Review Process	<ul style="list-style-type: none"> <li>Download Portfolio Reports and Insurance CoC</li> <li>Upload necessary files for progress review pack prep.</li> <li>Trigger next steps through Teams/Email/CRM</li> <li>Review ID on file and trigger new ID request if expired</li> </ul>	<p><b>67% Efficiency</b></p> <p>From 45min manual effort to only 15min robot processing time/task</p> <p><i>***Ave 425 hours/mo saved = 2.57 FTE, this is dependent on client schedule and volume</i></p> <p>Multiplier:</p> <p>ID review BOT can be run independently completing work 2min/ID vs 5min/ID</p> <p><i>***Ave 80 hours/mo saved = 0.48 FTE, this is dependent on client schedule and volume</i></p>	Salesforce SharePoint XPlan Platforms Insurance Portals
<b>Bot 7</b> <b>Mortgage Broking:</b> Salesforce CRM Data Entry & Document Sorting	<ul style="list-style-type: none"> <li>Automate CRM input and file/document management in MS Sharepoint and Salesforce</li> <li>ID Statements</li> </ul>		Salesforce SharePoint
<b>Bot 8</b> <b>Payroll:</b> Superannuation Processing	<ul style="list-style-type: none"> <li>Automate downloading of ClockOn reports</li> <li>Automated uploading of SAFF to Iress Portal</li> </ul>	<p><b>75% Efficiency</b></p> <p>From 20min manual effort to only 5 min robot processing time/task</p> <p><i>***Ave 19 hours/mo saved = 0.12 FTE, this is dependent on client schedule and volume</i></p>	IressPortal ClockOn SharePoint

