

INTRO TO AI FOR PARAPLANNERS

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Where are you on your AI journey?



Ostrich

Head in the
sand



Squirrel

Busy but
dabbling



Eagle

Confident
explorer



Owl

Wise,
experienced
user

How are you using AI?

For example...

1. Editing reports & letters

2. Drafting annual reviews

3. Summarising meeting notes

4. Proofreading & tone checks



AI is... a pattern-recognition tool that
predicts words to generate text.

It can draft, simplify,
and check communications
– **but it is not magic.**



Key AI terms you'll hear today



LLM – Large language model, trained on huge amounts of data.

Prompt – The instruction or question you give the AI.

Hallucination – When AI makes something up but sounds convincing.

Context window – How much the AI can “remember” in one go.

Automation – Using AI to take on repetitive tasks so you can focus on higher-value, strategic work.

Use AI responsibly:

1. Never input client data into public tools!
2. Turn data training off before you start
3. Always apply human review
4. Follow firm wording and compliance rules



Risks:



- ❗ Hallucinations
- ❗ Compliance wording
- ❗ Over-simplification
- ❗ Data security



A strong prompt has 3 parts:

1. Role
2. Client context
3. Task, constraints, tone



Bad vs Good Prompt

WEAK

“Write a client letter to XX about their pension”

*Weak: Too vague, no role or context
Summarise these meeting notes”*

“You are a paraplanner preparing a draft client letter on behalf of a financial planner... take technical financial details and turn them into a client-friendly summary that is accurate, and easy to understand.”

Stronger: Role + context + clear task

Fantastic Prompt Example

Role

You are a paraplanner preparing a draft client letter on behalf of a financial planner.

Context

Your role is to take technical financial details and turn them into a clear, client-friendly summary that is accurate, supportive, and easy to understand.

Tone

Constraints

Client:

Heather, 55, employed, two pensions, retiring at 65, worried about income.

Task:

Draft clear, supportive letter (max 350 words), explain options, reassure.

Constraints:

Short paragraphs, no jargon, alternatives for 'defined benefit pension.'



Promptathon: Anne & Gilbert notes



- Use the 3 steps below to write one clear prompt
- Be ready to share your best idea



Give AI a role
(e.g. "You are a
paraplanner...")



Add context
(what and why is
this task
important?)



Define the task
(what to do,
tone, length,
constraints)

Key takeaways:

1. Learn the key terms
2. Start small: proofread, simplify, summarise
3. Use adaptable prompt templates



Keep the human filter:
you ensure compliance & trust

What's one way AI could save you time this month?