

Redefining Roles in the Digital Age

Presented by:
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Ravit Gutman, CEO

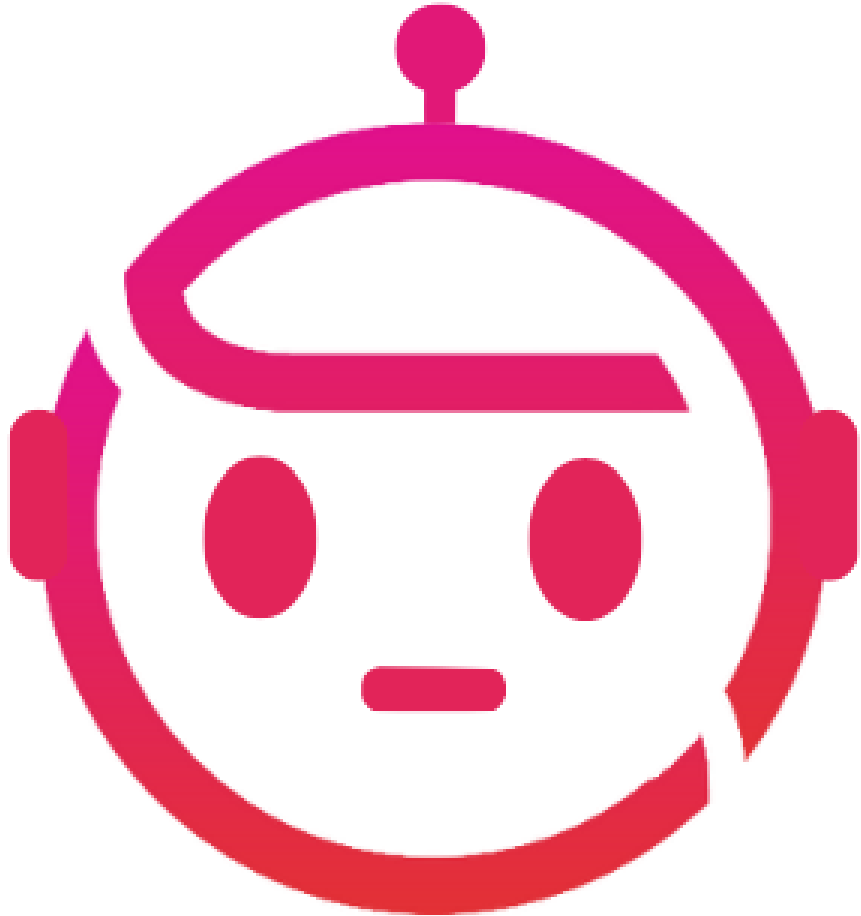
To empower teams by helping clients embrace change and take ownership of their **transformation journey, drive innovation through cutting-edge technology** that enables financial excellence, and create growth opportunities by delivering tangible improvements in efficiency, transparency, and business performance.

The New Era of Finance

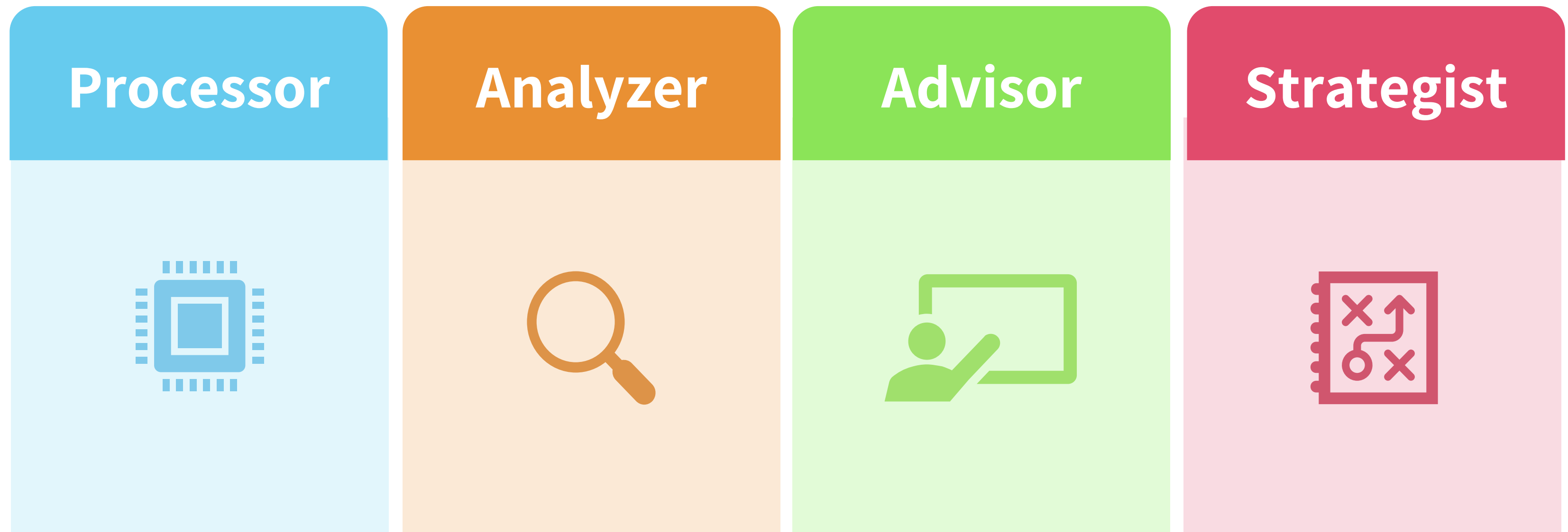


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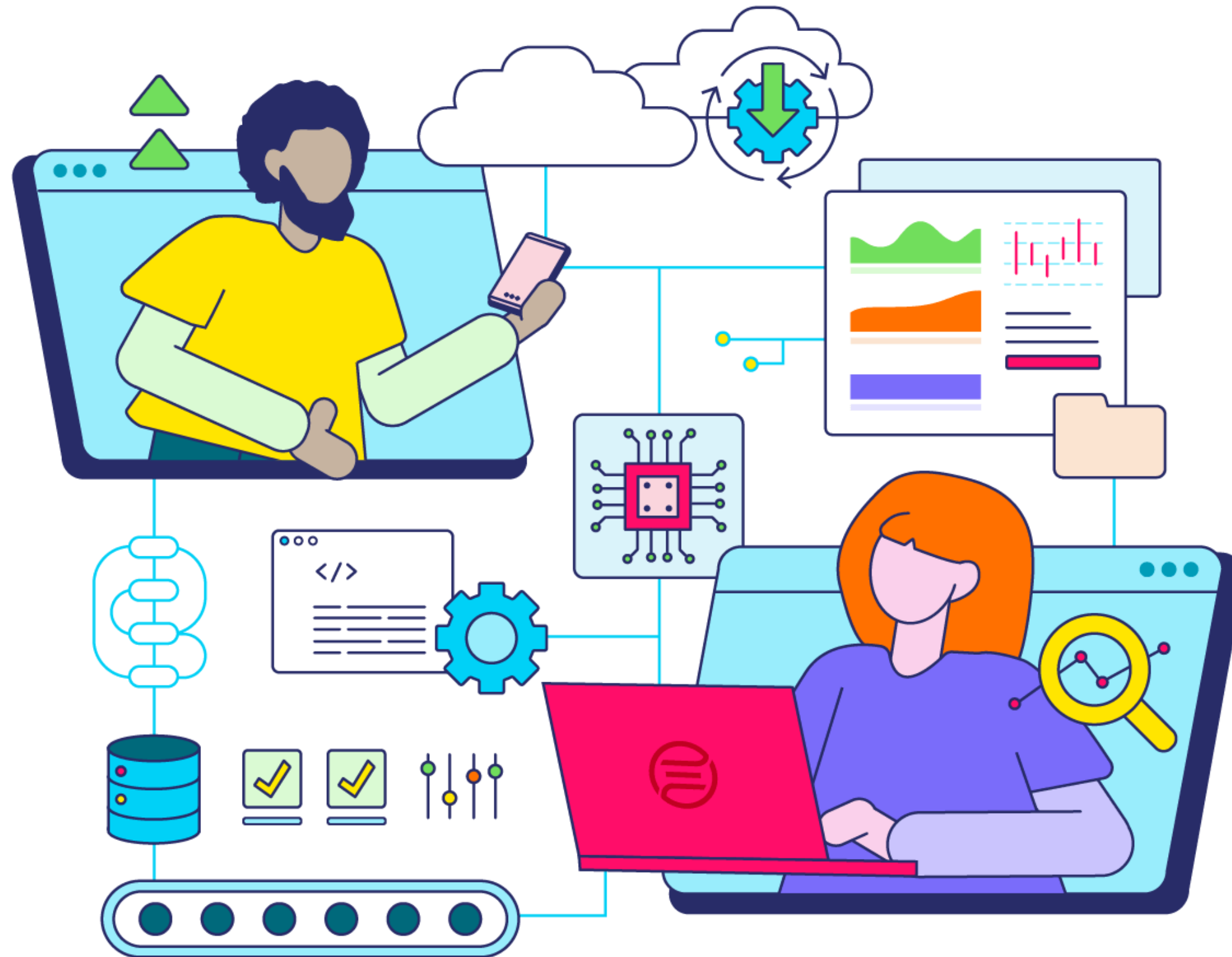
Automation: Myths vs. Reality



The Role Evolution Curve



AI + Human Collaboration



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Power Skills for the Digital Age



Empathy



Communication



Curiosity



Adaptability

The Advisor Mindset



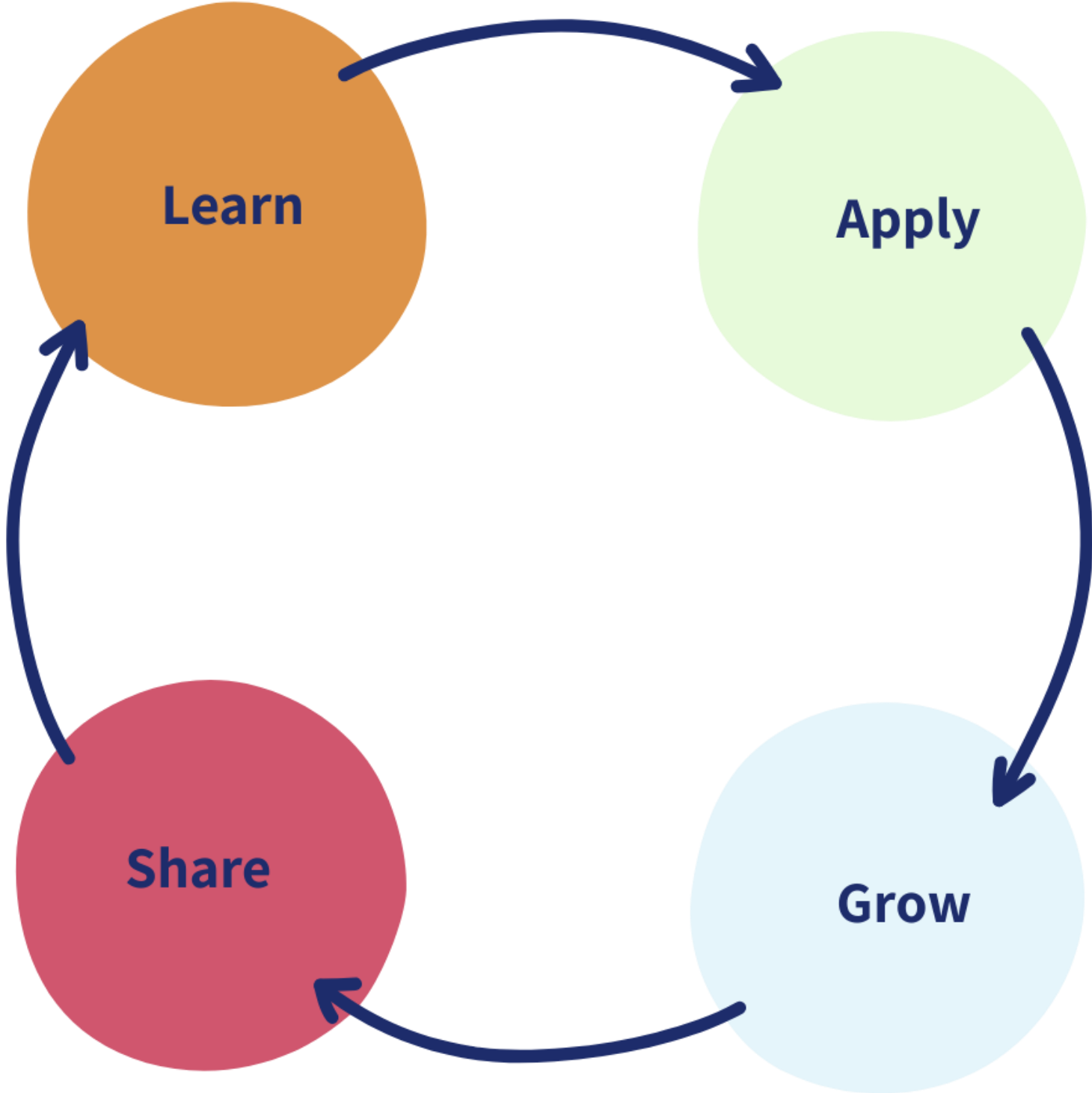
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Case Story: Reinventing AP



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The Continuous Learning Loop



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30-Day Role Remodel



Reflect



Reframe



Reach Out

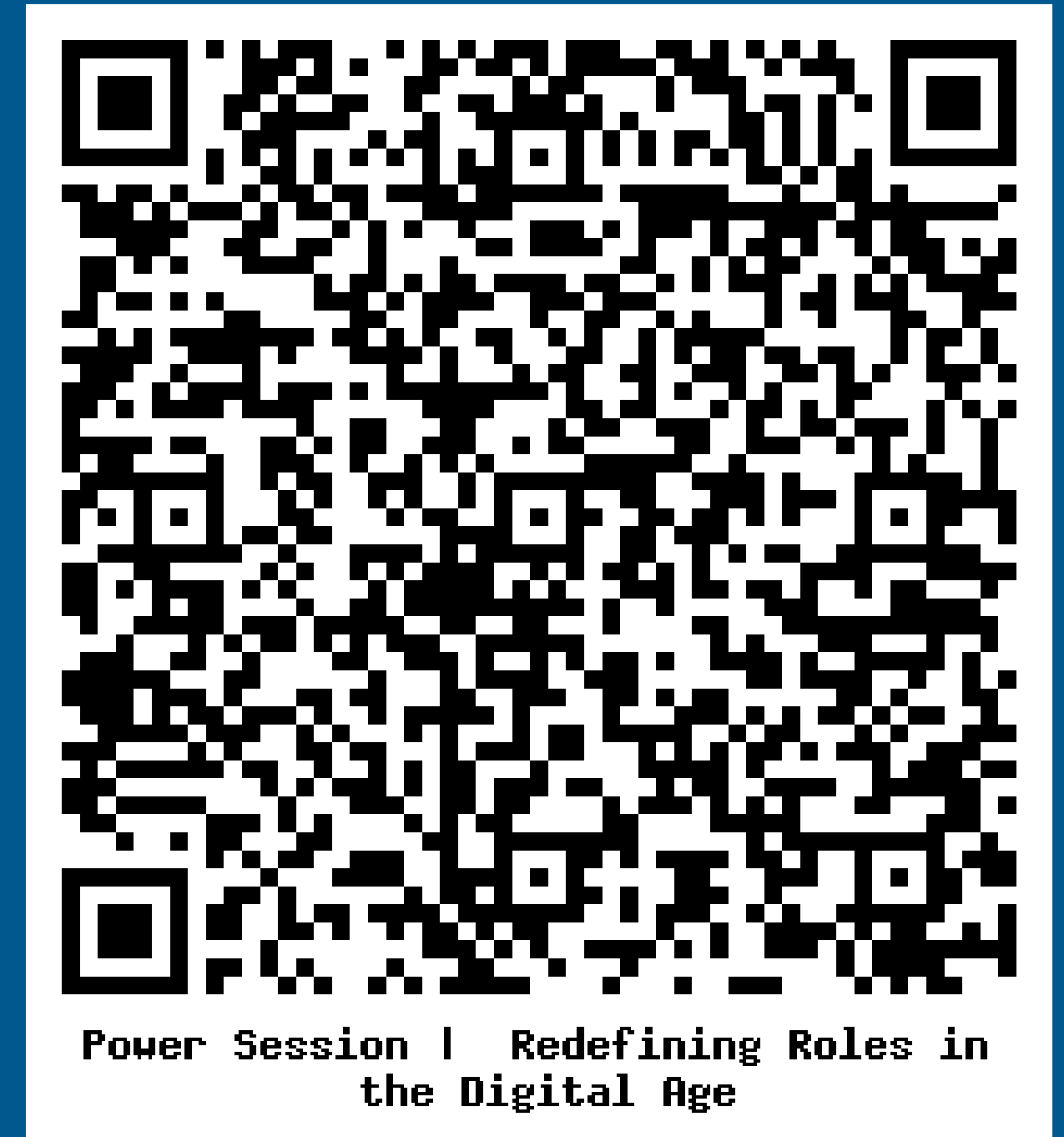
“

**Technology will not
replace finance
professionals, but finance
professionals who use
technology will replace
those who don't**

”

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- Also accessible via the mobile app



QUESTIONS?



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Ravit Gutman, CEO

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