



MICROSOFT  
PREDICTIVE PLANNING

Bambu partners with Microsoft to bring an **Innovative, Proactive** and **Predictive** planning tool for financial planning of the future.

### Plan for the future with predictive A.I technology.

The financial services industry has experienced great shifts in consumer habits that demand significant personalization and innovative solutions. Bambu and Microsoft are building vertical synergies in the wealth management space to equip advisors with resources that ensure clients strengthen their commitment to financial resilience. Bambu's Predictive Planning service will be offered through Dynamics 365 and Microsoft Cloud for Financial Services platforms in this partnership.

#### Take a peek into the financial multiverse.

Centered on financial planning, engagement and AI, the Hidden Markov Model and Generative Adversarial Network Discriminator simulates and determines the most probable predictions of a user's financial timeline.

#### The Future of Financial Planning

Predictive Planning is an AI model that studies the timelines of life events that happened to real people and captures the relationships between their pasts, presents, and futures.



#### Develop deeper connections

Anticipate client needs to better accommodate their demands and build trusted relationships.



#### Identify and prioritize clients' needs

Help clients discover valuable and essential goals to prioritize.



#### Increase sales productivity

Make targeted sales with a client-centric approach and optimize sales activities.