

MORGAN STANLEY WEALTH MANAGEMENT



INITIATIVE	AI @ Morgan Stanley Debrief
AWARD	Celent Model Wealth Manager 2025 for Emerging Technologies
EXECUTIVE SUMMARY	<p>Morgan Stanley's AI@MS Debrief tool exemplifies the effective implementation and adoption of GenAI in financial services. The tool leverages GenAI technology to assist financial advisors by automating client meeting notes and summaries, generating follow-up email drafts, and importing call information into clients' CRM profiles. The project required developing complex integrations between the firm's internal systems, OpenAI's transcription and GPT models, Salesforce's CRM platform, and Zoom's video conferencing platform. Morgan Stanley's 15,000 financial advisors now have access to AI@MS Debrief.</p>
WORKFLOW IMPROVEMENTS	<p>Advisors and support staff historically dedicated significant time to operational follow-on tasks after client meetings. This included drafting meeting minutes, writing client email summaries, and importing information into the CRM. AI@MS Debrief automates the post-meeting process for advisors. The following describes the new post-meeting workflow, where the advisor:</p> <ol style="list-style-type: none">1. Receives post-meeting email with a link to GenAI meeting notes in Debrief2. Reviews and edits the meeting notes and email summary draft if needed3. Clicks "create tasks" to draft action items and assign tasks4. Clicks "prepare email" to draft an email5. Sends the meeting summary email to the client
KEY BENEFITS	<ul style="list-style-type: none">• Time savings for advisors: Avg. of 30 min saved per one-hour client meeting.• Better advisor-client engagement in meetings: Advisors are more focused to have deeper conversations with clients.• Improved quality of meeting summaries: More regular, standardized, and detailed meeting summary emails generated and shared with clients.• Greater capacity for more meetings with more clients: Improves client satisfaction and enables advisors to expand their books of business.
KEY VENDORS	<p>OpenAI: transcription, large language models (LLMs), and GenAI output</p> <p>Salesforce: advisor CRM</p> <p>Zoom: video conferencing platform</p>
READ MORE	Please visit the Celent Wealth Management hubpage on Celent.com to learn more about this initiative.