

# How to: Use the Financial Gravity AI Assistant

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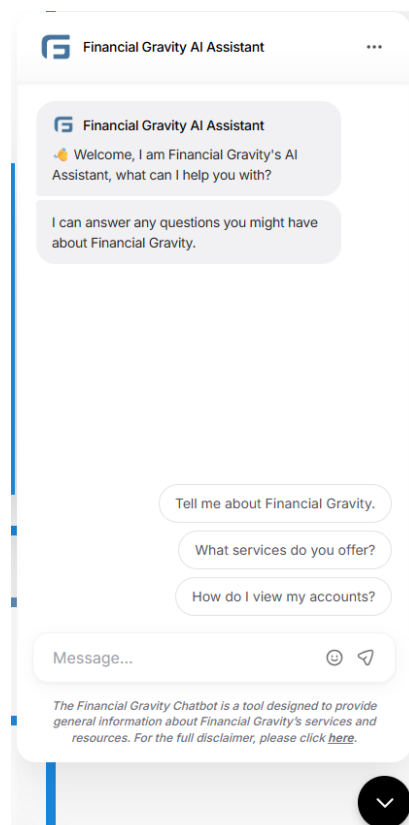
## Meet Your Financial Gravity AI Assistant (Public)

At Financial Gravity, we're committed to delivering exceptional service—and that includes providing quick, easy access to the information you need. That's why we're excited to introduce the **Financial Gravity Chatbot**, an AI-powered assistant designed to support you in real time.

### What Is It?

The **Financial Gravity Chatbot** is a convenient tool built to provide general information about Financial Gravity's services, platforms, and client resources. Whether you're navigating your financial accounts, preparing for a review call, or need help finding the right contact, this assistant is here to help.

Trained on our entire library of client-facing materials—including FAQs, brochures, guides, and more—the chatbot delivers accurate, up-to-date answers tailored to your needs. Even better? It continues to improve with every interaction.



### How It Helps

- Inv  
Ass
- Provides **instant answers** to common client questions
  - Offers guidance on **next steps** or where to go for further support

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- Connects you with a team member when more detailed help is needed
- Saves you time by reducing the need to search for information manually

## Ask It Anything (Almost!)

To get the best results, speak to the chatbot like you would to a real person—clearly and conversationally. Try questions such as:

- “How do I log into Addepar?”
- “How do I mail a check to Schwab?”
- “What should I expect on my review call?”

If the chatbot doesn’t have the answer, it will help direct you to someone who does.

## Fast. Friendly. Financial Support.

The Financial Gravity AI Assistant is part of our ongoing effort to make your experience as seamless and personalized as possible. Whether it’s a quick question or guidance on where to go next, your chatbot is here to help—anytime, anywhere.

## How to Access the Chatbot

To start using the Financial Gravity Chatbot, simply **click the black chat icon** located in the bottom-right corner of the **Knowledgebase** or the **Financial Gravity website**. Once clicked, the chatbot will open and be ready to assist you in real time with your questions or direct you to the right team member.



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