

Retirement Services AI Workshop

Schedule a workshop with our team and start modernizing retirement plan servicing in days.

GenAI can be complicated. We can help!

When it comes to retirement servicing: plan rules, loan limits and hardship provisions vary by employer. These differences create service friction and compliance risk. We offer a workshop focused on how generative AI and retrieval techniques can make retirement servicing faster, more accurate, and fully auditable.

What is it?

A focused, half-day workshop that maps your retirement-plan operations to practical generative-AI applications—covering plan document retrieval, participant guidance, and workflow integration.

Where is it?

We conduct these sessions on site or virtually, depending on your needs.

Who should attend?

Up to twenty stakeholders from Operations, Contact Center, Compliance, IT and Plan Administration.



Sample Agenda

AI fundamentals and terminology	30 min
A plain-English primer on generative AI and retrieval-augmented generation.	

Generative AI for retirement services	30 min
Show how adoption agreements, SPDs and procedures are segmented and indexed for precise retrieval; explain how responses are generated and reviewed to ensure compliance.	

Use-case prioritization and selection	60 min
Assess potential scenarios by business value and implementation effort; identify which plan-servicing use cases to pursue first.	

Hands-on demonstration with your documents	60 min
Using sample plans you provide, answer participant questions about loans, hardship withdrawals, distributions and vesting; compare these results to your current process.	

Why schedule a workshop?

This session distills a complex space into clear options. We work with you to evaluate use cases against a simple value-versus-effort framework and give you a practical roadmap for rolling out generative AI in retirement servicing.

What's included?

- A preparatory meeting to review your metrics, gather sample documents and align on goals.
- A use-case assessment framework that weighs business impact, complexity, resource availability and time to market.
- A post-session findings and recommendations brief summarizing priorities and outlining next steps.