How Our Firm Uses AI

A note on technology at Preflight Financial

Preflight is built by a team that has always been technology forward. We were among the first advisory teams in our area to offer virtual advising to clients across the country, and digital workflows have shaped how we operate from the beginning. Artificial intelligence is the latest extension of that approach.

We adopt new tools the way we make planning recommendations: deliberately, after careful review, and with our clients' best interest first. As fiduciaries, we hold that standard in every decision we make, including which technology we bring into the firm. Before any tool touches our workflows, we review its terms, regulatory requirements, data practices, and privacy posture.

How We Put AI to Work

AI works differently across the firm. The common thread: our people apply the judgment, and the tools handle the mechanics.

Operations

Client workflows are tracked in a dashboard we built in-house, visible to the entire advisory team within a secure, encrypted environment, so everyone can see where each engagement stands. When a deadline approaches, the system automatically alerts that client's advisory team. Beyond workflow tracking, operations uses AI for extra layers of due diligence, like running vendor terms and conditions through AI to flag privacy vulnerabilities and contract red flags, and maintains automations that connect the platforms we rely on so information moves without manual re-entry.

Marketing & Communications

Our communications team uses AI throughout the content pipeline: cleaning up podcast transcripts for publication, converting episodes into articles, and drafting first pass copy that a person always reviews. When journalists request expert commentary, AI helps format our advisors' insights for press deadlines. The same tools help us build performance dashboards and develop code for our website.

Client Services & Administration

A real team member answers our phones and handles your scheduling. Behind the scenes, the client services team uses AI to build the spreadsheets and trackers that keep daily work organized, to streamline recurring processes, and to proofread correspondence before it goes out. Small efficiencies, repeated daily, with the goal of faster responses for clients.

Advising

Our advisors' recommendations are never AI outputs. Every strategy is developed, tested, and pressure-checked by the advisory team before it reaches a client, and the modeling software behind that work is entirely AI-free. Where AI earns its place is in the work around that thinking. One of our advisors describes it as a linguistic calculator: he controls the inputs as the expert, and the tool handles the mechanical work of language. Advisors dictate their analysis aloud and AI types it up as meeting notes, follow ups, and emails, turning the thinking they've already done into finished writing in a fraction of the time. Where we do use AI, we work on enterprise accounts with agreements that ensure nothing we input is ever used to train the models.

Where We Draw the Line

AI does not generate financial advice or investment recommendations at Preflight. Every recommendation comes from a human advisor who knows your situation. We do not record or AI-summarize our conversations with you at any stage, from your first intake call through ongoing reviews. The information you share in our intake form is never processed by AI. And plan presentations, where your advisor walks you through the work, are an entirely AI-free zone.

Why It Matters

Every hour these tools save on administrative work is an hour our advisors spend researching, communicating, and advising. We plan to keep evaluating new technology the way we always have: adopting what makes the firm more efficient, protects client privacy, and keeps our advisors focused on our clients.