

Secure AI Automation, Built Around Your Financial Systems

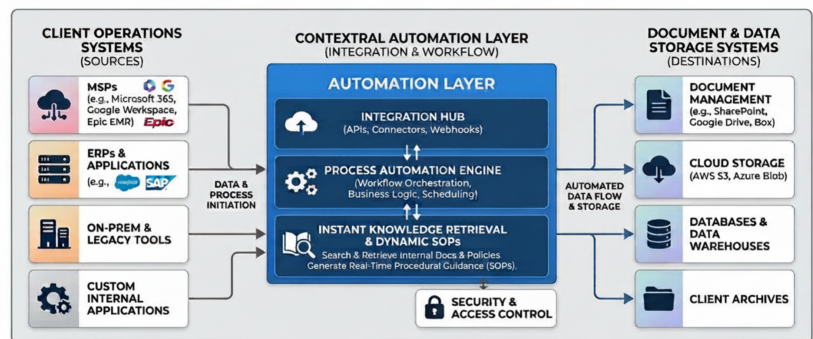
A private automation layer for financial institutions that can't afford to take chances with client data, regulatory compliance, or operational risk

The Challenge

Organizations lose hours to fragmented client data, disconnected core systems, legacy platforms, and information spread across shared drives and internal applications. Security, privacy, and regulatory requirements often limit the use of public AI tools, while employees continue to spend valuable time searching for information, manually processing workflows, and navigating disconnected systems.

How We Fit Into Your Systems

We deploy a private automation layer between your core banking, wealth management, lending, CRM, compliance, and operational systems - and where your data already lives.



What We Automate For You

- **Document & records search:** Instant retrieval across core platforms, CRMs, document repositories, and legacy systems
- **Workflow automation:** Faster access to information across shared drives, policies, procedures and archives
- **Dynamic SOPs:** living playbooks generated from your own documentation
- **Compliance & audit reporting:** Structured, traceable workflows and reporting designed to support internal controls, regulatory requirements, and audit readiness
- **Secure storage & archiving:** cloud storage, document management, databases, and archives
- **Systems integration:** APIs, connectors, and webhooks across your existing infrastructure

How We Work With Clients

1. **Discovery & Assessment:** We map how your team works today and where automation saves the most time without adding or taking anything out.
2. **Tailored Design & Engineering:** We use existing tools from your MSP/ERP or deploy our own inside your ecosystem to solve problems. No costly overhaul, no months of implementation.
3. **Private Deployment & Ongoing Support:** We roll out in phases with your team, then stay on as a long-term partner. We don't sell a tool and disappear.

Why Contextral?

Our team specializes in isolation systems and regulated industries, designing every solution without third parties or opaque vendors. We work within your existing tools where possible and deploy our own on-prem/private-cloud systems when compliance demands it, but you always keep full data ownership. That approach helped Newark, NJ's Department of Public Works avoid an estimated \$3-4M in costs through automated reporting and analytics.