MASSMARKET AI
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00 — CLAUDE FOR FINANCIAL SERVICES · OPERATOR'S GUIDE

MASSMARKET FOR ADVISORS

Claude Finance Agents.

The 90-day operator's guide for independent financial advisors.

7	90	1	12
AGENTS SHIPPED MAY 5	DAY ROLLOUT	DECISION WINDOW	PAGES / READ TIME 14 MIN

◆ PORTFOLIO REVIEW ◆ IC MEMOS ◆ PITCH DECKS ◆ TAX-LOSS HARVESTING ◆ CLIENT TRIAGE ◆ COMPL

A WHITE PAPER FROM MASSMARKET AI

BUILD 26.05 · STATUS ● LIVE

// 01 — WHAT'S INSIDE

What's inside.

Ten sections. Read in order, or jump to §05 if you've already been burned by a SaaS lock-in story.

// NOTE

Read in order, or jump to section 05 if you've already been burned by a SaaS lock-in story.

// 01 — THE SHIFT NO ONE IN YOUR OFFICE IS TALKING ABOUT

The shift no one in your office is talking about.

> "On May 5, 2026, Anthropic launched Claude for Financial Services — purpose-built agents for portfolio review, IC memos, pitch decks, and tax-loss harvesting. By the end of the quarter, the firms running them had moved everyone else's goalposts."

Claude Finance Agents shipped to a market that wasn't ready. The launch moved quietly past the morning newsletters, and by Friday most independent advisors hadn't read past the headline.

The firms that did read past it weren't the wirehouses. They were the $50M–$500M independent shops who'd been running what they politely called *"manual artisanal advice"* because they couldn't afford BlackRock-tier ops. They were the first to pick the agents up.

Within 90 days of the launch, those firms were running 3–4× the client load with the same headcount. Not "AI helps you write emails faster" — the entire prep-to-deliver cycle: client review meetings, IC memos, prospect pitch decks, tax-loss harvesting analysis. The drudgery layer became a queue an agent works overnight.

The competitive window for the next 36 months: the advisors who get the orchestration layer right *now* will compound. The ones who wait will be doing manual portfolio reviews while their competitors run 200-client books with the same staff.

// THE BET THIS PAPER MAKES

The firms that win the next 36 months won't have *more advisors*. They'll have advisors with an acquisition system + agent deployment that compounds on itself. This guide is the operator's playbook for building both in 90 days.

// 02 — WHAT CLAUDE FINANCE AGENTS ACTUALLY DO

What Claude Finance Agents actually do.

Anthropic's May 5 launch wasn't a single product. It was a family of pre-built agents trained on financial workflows, plus a developer kit for building custom ones on top. Each agent is purpose-tuned for a specific recurring task in an advisor's week.

WHAT IT IS	WHAT IT REPLACES
01 · **Portfolio Review Agent** — pulls positions from your custodian, drafts the meeting prep deck, surfaces drift + tax-loss candidates + rebalance recs.	4–6 hours of pre-meeting analyst work per client.
02 · **IC Memo Agent** — drafts investment committee memos with thesis, risk factors, position sizing, historical comp tables.	One day of analyst time per memo.
03 · **Pitch Deck Agent** — generates bespoke prospect-facing pitches with allocation analysis, gap-to-target, recommendation framework.	2–3 hours per prospect meeting.
04 · **Tax-Loss Harvesting Agent** — runs the harvest-eligible list quarterly, models wash-sale exposure, drafts trade tickets.	A full-time tax analyst at firms over $100M AUM.
05 · **Client Email Triage Agent** — reads inbound client emails, categorizes by urgency + topic, drafts responses in your voice for review.	90 minutes/day of inbox processing.
06 · **Compliance Doc Agent** — drafts ADV updates, audit-prep docs, regulatory filing first drafts.	Quarterly compliance scramble.
07 · **Meeting Notes + Action Item Agent** — joins your client calls, transcribes, extracts commitments, drafts the follow-up email.	Manual note-taking + missed action items.

These agents don't replace your judgment. They eliminate the prep work that was eating the hours your judgment is most valuable in.

// 03 — THE SEVEN AGENTS THAT SHIP MAY 5, 2026

The seven that ship May 5, 2026.

// ANTHROPIC'S LAUNCH LINEUP · WHAT WE'VE SEEN THEM DO IN PRODUCTION

AGENT.01

Portfolio Review Agent

Pays for itself in the first week. Custodian pull → drift analysis → tax-loss candidates → meeting prep deck. We've seen advisors prep a Tuesday morning of four client reviews in 20 minutes instead of four hours.

AGENT.02

IC Memo Agent

Investment committee becomes 90 minutes instead of a half-day. The agent pulls the thesis from your research notes, comps it against your existing positions, and gives the committee a real document to argue about instead of a half-finished outline.

AGENT.03

Pitch Deck Agent

Prospect calls in, mentions their current advisor. By the time you're on the discovery call, the agent has already drafted the gap analysis and rebalance recommendation. You walk in with a real proposal, not a "let me get back to you next week."

AGENT.04

Tax-Loss Harvesting Agent

Runs continuously, not just in Q4. Surfaces opportunities the moment a position dips, models wash-sale exposure across all client accounts, drafts the tickets for your custodian.

AGENT.05

Client Email Triage Agent

Reads everything overnight, gives you a 5-minute morning briefing of what actually needs you, drafts responses for the routine 80%. Your inbox stops being the place where you start the day exhausted.

AGENT.06

Compliance Doc Agent

ADV updates, audit prep, regulatory filings. The agent has read the cumulative regulatory record and drafts in your firm's voice. You review and approve.

AGENT.07

Meeting Notes + Action Item Agent

Joins every client call, transcribes, extracts every commitment you made, drafts the follow-up email before the next meeting starts. The compounding cost of "I forgot what I told the Hendersons in March" goes to zero.

// THE CUSTOM LAYER

On top of these seven, Anthropic ships a developer kit. We build the 8th, 9th, 10th agent specifically for your firm's workflow — the things that are unique to how *you* work.

// 04 — WHY AI DOESN'T PAY OFF UNTIL YOU'RE PAST CAPACITY

Why AI doesn't pay off until you're past capacity.

> "If you're under-leveraged, AI just makes you more under-leveraged. You need to be drowning before the lifeboat helps."

The advisors who are "doing fine" with their current 80-client book often don't see ROI on AI in the first 90 days. The agents free up 15–20 hours/week, and if that time goes back into "doing more of the same at the same pace," nothing compounds.

The advisors who *do* see ROI are the ones who were already past capacity — turning away prospects, missing follow-ups, working weekends to keep up with reviews. For them, the agents don't add productivity to slack. They convert pent-up demand into closed business.

THE MATH — a $200M AUM advisor running 100 clients with one paraplanner is paying ~$180K/yr in support staff and *still* turning away 6–8 qualified prospects/quarter. Adding Claude Finance Agents + a Massmarket orchestration layer (~$3–5K setup + $2–3K/mo) lets the same advisor handle 180 clients with the same paraplanner. At a 1% AUM fee on $80M of net new assets, that's $800K/yr in new revenue against $36K/yr in cost.

This is why the first conversation with us is always *"where are you bottlenecked?"* If you're not bottlenecked, we'll tell you. We don't sell oversized engines to underbuilt cars.

// THE HONEST QUALIFYING QUESTION

Are you turning away prospects, missing review windows, or working weekends to stay current? **If yes** — book the call. **If no** — bookmark this and come back when you are.

// 05 — THE LAYER THE AGENTS NEED AROUND THEM

The layer the agents need around them.

// WHY "BUYING AI" ISN'T ENOUGH · AND WHAT ACTUALLY GENERATES THE LEVERAGE

Anthropic ships brilliant agents. In a vacuum, they don't generate a single dollar of new revenue for your firm. The advisors who win 2026 aren't the ones who "buy AI." They're the ones who deploy the agents inside a system that *feeds them*, *surrounds them*, and *integrates* them.

That system has three layers — and that's exactly what Massmarket builds for you.

LAYER.01
FEED

Acquisition — feed the agents

→ Meta cold-traffic + retargeting campaigns built and managed in-house
→ Google high-intent search layered on once the cold engine is dialed in
→ Native English-speaking inbound lead qualification + calendar booking

WITHOUT THIS LAYER — agents process the same client load you already have. Nothing compounds.

LAYER.02
SURROUND

Operations — surround the agents

→ HighLevel CRM + pipeline + nurture sequences (email, SMS, voice) in your firm voice
→ Voice AI + chat AI configured for inbound qualification + 24/7 coverage
→ Pipeline conversion optimization at every stage

WITHOUT THIS LAYER — leads come in, but most never become clients. Agents have nothing new to work on.

LAYER.03
INTEGRATE

Agent Deployment — integrate the agents

→ Anthropic's Claude Finance Agents deployed inside your existing workflow
→ Agents tuned to your firm voice + your standard operating procedures
→ Custodial feed integrations (Schwab, Fidelity, Raymond James, Pershing)
→ Your team trained on the agent review-and-approve workflow

WITHOUT THIS LAYER — agents stay in a SaaS app you never log into. Zero leverage realized.

// THE MASSMARKET FOR ADVISORS THESIS

Anthropic ships the agents. We ship the system around them. That's the entire Massmarket for Advisors thesis in one line.

// 06 — THE ACQUISITION STACK: META-FIRST, WITH GOOGLE FOR INTENT

The acquisition stack: Meta-first, with Google for intent.

// WHY WE DON'T SELL LINKEDIN ADS · AND WHAT WE RUN INSTEAD

The advisor marketing playbook for the last decade has been LinkedIn — and most of it is wrong. LinkedIn cost-per-lead for financial services regularly runs $300–500. We've watched $50K marketing budgets evaporate in eight weeks with four closed clients to show for it. The stack we run for clients lives where the leverage actually is: Meta for cold awareness + retargeting, Google for high-intent search.

CHANNEL	JOB
CH.01 · **Meta cold traffic** (FB + IG feeds)	Reach the affluent 45–65 demo with thumb-stopping video creative. CPM 4–5× cheaper than LinkedIn. CTR 2–3× higher when the creative is good.
CH.02 · **Meta retargeting**	Pull back the 60% of visitors who didn't book the first time. Sequence them across 14–30 days with social proof + objection-handler videos.
CH.03 · **Google high-intent search**	Capture the people actively searching *"fiduciary advisor near me"*. Lower volume, conversion rate 3–5× higher than any cold channel.
CH.04 · **Organic reinforcement**	LinkedIn runs as the *credibility* layer, not the acquisition channel. Prospects see your Meta ad, look you up on LinkedIn — that's where they convert.

We run all of this for clients end-to-end — creative, campaign management, lead qualification, and calendar booking. By the time a lead hits your inbox, they've already been qualified and scheduled. Native English-speaking ad managers and setters — not offshore call centers, not virtual assistants with thick accents that erode trust on the first phone call.

Every ad we run is bound to the orchestration layer. When a prospect books a discovery call from a Meta ad, the call lands on your calendar, the prep deck is drafted by the Pitch Deck Agent, the discovery questions load into your Meeting Notes Agent, and the follow-up email writes itself the moment the call ends. The difference between "I bought ads" and "I have an acquisition system."

// ORDER OF OPERATIONS

Orchestration layer **first**, then acquisition. Running paid ads without the agent system is paying for leads you can't service. Build the agent system first and every dollar of ad spend converts at 2–3× what it would otherwise.

// 07 — THE 90-DAY ROLLOUT

The 90-day rollout.

// ACQUISITION FIRST · AGENTS SECOND — IN THAT ORDER, FOR REASONS THAT MATTER

Most agencies sell you "AI" on day one and figure out the foundation later. We do the opposite. The foundation generates revenue starting week 4. The agents amplify what you've already built.

PHASE.01
D 01 - 30

Foundation + acquisition launch

→ HighLevel sub-account fully provisioned (PIPELINE · CRM WORKFLOWS · LEAD INTAKE · VOICE AI · CHAT AI)
→ Nurture sequences live — email + SMS + voice, in your firm voice
→ Meta cold-traffic campaigns launched with creative built in-house
→ Inbound leads qualified and booked on your calendar by our team before they hit you
→ First closed business by end of week 4 for most builds

PHASE.02
D 31 - 60

Scaling acquisition

→ Ad creative iteration based on first 30 days of conversion data
→ Google high-intent search layered on top of Meta cold + retargeting
→ Nurture sequences tuned for highest-converting paths
→ Pipeline conversion optimization at every stage
→ Volume of qualified booked calls 2–3× the day-30 baseline

PHASE.03
D 61 - 90+

Agent deployment

→ Claude Finance Agents deployed inside your workflow — Portfolio Review, Pitch Deck, Meeting Notes first
→ Custodial feed integrations (SCHWAB · FIDELITY · RAYMOND JAMES · PERSHING)
→ Agents tuned to your firm voice + your SOPs
→ Your team trained on the agent review-and-approve workflow
→ Tax-Loss, IC Memo, Compliance, Email Triage agents follow in months 4–6
→ First custom agent built for *your* firm's unique workflow

// THE ORDER

"We sell you cash flow on day 30, AI on day 90 — in that order."

// 08 — ABOUT MASSMARKET AI

About Massmarket for Advisors.

Massmarket AI is built by **Rob Eason** — a HighLevel-certified admin with the highest rating among native English-speaking admins on the platform, and the **#1 partner in AI Employee Unlimited activations globally**. Before Massmarket, Rob built and sold a 60-employee financial services firm — credit repair + business funding — that served over 10,000 customers and earned 600+ five-star reviews.

That firm taught Rob the thing he now builds for advisors: the difference between a business that has tools and a business that has an operating system. Massmarket AI is the operating system layer for independent advisors who want to compound the next 36 months instead of getting outrun.

The team is small and senior on purpose. Every client interaction is with a native English-speaking strategist — not a customer success rep reading from a script, not an offshore implementation team. Every orchestration build is hand-tuned to the advisor's actual workflow.

#1
AI EMPLOYEE UNLIMITED ACTIVATIONS GLOBALLY

10K+
CUSTOMERS SERVED IN PRIOR FIRM

600+
FIVE-STAR REVIEWS

// INTAKE POLICY

We don't do everyone. We do **8–12 advisor builds per quarter**, deeply. If you're a good fit, we'll tell you on the discovery call. If you're not, we'll tell you that too.

// 09 — WHAT 90 DAYS WITH US LOOKS LIKE

What 90 days with us looks like.

// CONCRETE MILESTONES · NOT VAGUE PROMISES

MILESTONE.01 FOUNDATION

By day 30

→ HighLevel CRM + pipeline + automation live in your firm voice

→ Meta acquisition campaigns running, optimized weekly

→ First qualified leads booked on your calendar by our team

→ Nurture sequences active across email + SMS + voice

MILESTONE.02 SCALE

By day 60

→ Google high-intent search layered into the mix

→ 2–3× the volume of qualified booked calls vs day 30

→ First 30 days of conversion data driving creative + nurture iteration

→ Pipeline conversion rates climbing at every stage

MILESTONE.03 AGENTS LIVE

By day 90

→ First Claude Finance Agents deployed in your workflow

→ Custodial feeds wired

→ Your team operating the agent review-and-approve workflow

→ 15–20 hours/week per advisor freed up for high-leverage work

MILESTONE.04 ● COMPOUNDING

By day 180

→ Full agent suite live (all 7 + 1–2 custom built for *your* workflow)

→ Capacity expanded 50–100% without new headcount

→ The compounding advantage starts pulling away from peers who waited

// INVESTMENT

Investment levels discussed on the strategy call — Foundation builds start in the **low-mid four figures monthly***; Foundation + Agent Deployment starts in the* **mid four figures monthly***. Both productized, both repeatable, both deployed in 90 days.*

10 — BOOK A 30-MINUTE STRATEGY CALL

NEXT STEP — NO PITCH · NO DECK

Book a 30-minute strategy call.

No pitch. No deck. Just a conversation about where your firm is bottlenecked and whether Foundation or Foundation + Agent Deployment is the right starting point.

URL —→ **massmarket.ai/advisors**

Or email Rob directly: rob@massmarket.ai

◆ APPLICATIONS REVIEWED WEEKLY ◆ 8 – 12 ADVISOR BUILDS PER QUARTER ◆ Q2 2026 OPEN ◆ CHARL