Clients without a meeting — 210 files prepared

LINDBERGH FORMATION — 16 rue de Maillé, 91310 Montlhéry, France · Companies register (RCS) Evry 817 946 114

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Sorted by what has changed for them · fictional document

Fictional document — demonstration example

This document is produced by the Blue Lemon Agent website to illustrate what an AI agent hands to its users. The companies, matters, amounts and people in it are invented. It has no legal, accounting or commercial value.

Fictional document, produced for the demonstration. **Calling in file order means calling first the people who need nothing.** The 210 files are sorted by reason to call.

What reading the 210 showed

Reason to call	Volume	What it represents
Risk profile not reviewed for more than 24 months	**84**	**A reason to call in itself, and a legitimate one**
Deadline within 12 months	61	End of lock-in, end of contract, regular deposit ending
Idle cash above 5 %	**47**	**€1.6m in total**
No transaction and no contact for 36 months	**18**	**Those whose departure only shows on the day of the transfer**

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What is prepared for each

Element	Content
Up-to-date report	Composition, performance, transactions, charges
Reason to call	**In one sentence, drawn from the facts of the file**
Factual elements	The six elements of the meeting file
Slots	**Three, in the diary of the adviser who follows the client**

What the quarter gave

Measure	Value	Who measured it
Meetings held out of the 210	**148**	Advisers' diaries
Additional assets entrusted after those meetings	**€3.4m**	**The firm's partners**
Twelve-month client retention	**91.8 % → 97.2 %**	**51 relationships kept out of 940**

The asset figure is the firm's, not the agent's: the agent made the meetings possible, the advisers held them, and the advice given in them is theirs.

> **No client ever again reaches 18 months without a meeting without the firm knowing it.** The report runs to one page per adviser and updates itself every Monday.

For the firm to set

Alert threshold without a meeting: _____ months

Scope of this document: the service operated by Blue Lemon Agent. For an agent deployed at your premises, the applicable location is that of the architecture set out in the quotation and verified before commissioning; local execution is announced only for the configuration explicitly described and accepted in the quotation; the applicable isolation depends on the deployment mode set out in the quotation, no dedicated isolation being presumed; the encryption mechanisms in transit and at rest, their components and key management are those documented for the

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architecture chosen; roles and permissions are configured and accepted for the identities and systems actually connected; the events logged, their content, their retention period and who may access them are defined for the deployment chosen.

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