



Dispatch mandate — capped and dated

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Document issued on 24/09/2026

Written, withdrawable with a single word · 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. **The mandate covers sending documents ALREADY signed by their adviser.** An unsigned document does not go out, and no dispatch contains a recommendation.

What the mandate covers

Act	Condition	Where the rule comes from
Sending the quarterly reports	Signed by their adviser, format and wording approved by compliance	The firm's template
Recipients	Clients not marked « hand delivery »	List kept by the partners

What caps it

Limit	Rule
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Content	No recommendation in a dispatch — it is handed over in a meeting or under the adviser's signature
Exclusions	34 clients marked « hand delivery » — the firm's largest accounts
Frequency	One campaign per quarter only, on the dates set by the partners
Duration	Review after three months. Without an explicit decision, the mandate stops — renewal is what takes a signature
Withdrawal	One word, effective within the minute; the dispatch reverts to a manual campaign

What it is worth, on the firm's own figures

Measure	Before	Under mandate
Dispatch campaign	3 weeks	40 minutes
Document arriving after quarter end	34 days	6 days
Middle-office time	3 weeks per quarter	Returned to preparing the files

The next day's report

Indicator	What it showed at the last dispatch
Documents sent	940
Documents opened	Tracked client by client
Failed addresses	11 out of date, corrected — the 11 clients received their document

The mandate creates no new rule: it gives in advance, in writing, the decision to send documents the firm has already signed — and the log ties every dispatch to its signature.

For the partners to set

Campaign dates and review date: _____

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