

Anaboo AI

Ignite Intelligence

THE AI OPERATING SYSTEM FOR WEALTH & ASSET MANAGEMENT ·
SINGAPORE MAS-FIRST

AIOS for Wealth Managers

AIOS = AI Operating System.

Fragmented data, unified intelligence. Office or field —
same system.

Reclaim 520+ hours a year — 10 hours a week, every week. Spend them on
relationships, not screens.

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A note from Brett, before you read

Hi — I'm Brett Alegre-Wood, founder of Anaboo AI.

I've spent three decades building, running, and selling businesses. The last three years I've spent building the AI Operating System that now runs them. I've felt the thing you feel — the sense that AI is coming fast, that nobody has time to figure it out properly, and that the tools you're being sold look flashy but don't quite fit the way you actually work.

This document is the first draft of **AIOS for Wealth Managers** — our **AI Operating System** built specifically for your world. It's built around the daily lives of Asset Managers, External Asset Managers, Wealth Managers, Single Family Offices, and Multi-Family Offices — people I've spoken to, watched at their desks, sat next to on flights. It's built MAS-first. It's built so it works on your phone as well as your six monitors.

Everything here is real. The research is direct from primary sources. The 10 skills were designed from a practitioner's 8 daily pain-points. The hours-reclaimed numbers come from observed workflows, not marketing math.

I want your honest reaction. There's a feedback form at the end. Ten minutes of your time, ten bullets to mark up.

If this lands, we'll open a pilot cohort in Q2 2026 — 10 firms, hand-picked for fit. You'll get v1 at pilot pricing and a direct line to me.

If it misses, tell me what I missed. That's worth more than a polite yes.

“AI is 80% business process re-engineering — the same work we've been doing for 20 years. The 20% is the magic.”

— Brett Alegre-Wood, Founder, Anaboo AI

— Live with passion & AI, Brett

What's inside

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01

About Anaboo & AIOS

Who we are. What we build. Why it matters to your firm.

About Anaboo AI

Anaboo AI exists to make AI work for established business owners who don't have the time, headspace, or appetite to figure it out themselves.

We're not a software vendor. We're not a research lab. We're a done-for-you AI implementation firm. Brett founded Anaboo in 2023 after three decades running property, financial services, and operations businesses across Singapore, the UK, and Australia. Every solution we deploy has been stress-tested in Brett's own businesses first.

Founded

2023, Singapore. Brett's earlier ventures — EzyTrac Property (2009), Gladfish / YPC (2004), Darra Tyres (1984) — still run today.

Presence

Singapore (primary), United Kingdom, Gold Coast Australia. 10+ people across full-time and contract.

Scale

~USD \$1M annual revenue. Engagements USD \$10k–\$100k. Growing via done-for-you delivery.

Focus

Profitable businesses, 10–50 staff, owner-led. Industry agnostic. Singapore, UK, Australia, global.

What we believe

- **AI is 80% business process re-engineering, 20% magic.** Anyone telling you otherwise is selling you the wrong thing.
- **AI augments your team, it doesn't replace it.** Every implementation brings your people along.
- **Clarity over complexity.** If a 50-year-old business owner can't follow it, it's wrong.
- **Action over perfection.** Start small. Prove it. Scale what works.

OUR PROMISE

Reclaim 10+ hours per week per senior person. Your team stays. Your control stays. Your compliance stays. The only thing that leaves is the low-value work that was burning your day.

About AIOS — the Anaboo AI Operating System

AIOS = AI Operating System. A modular operating layer that wraps around your whole business. Not software you install — six digital workspaces, each running its own specialist agents, all coordinated under one roof. It's how Anaboo delivers done-for-you AI implementations without your firm needing to hire a tech team.

The AIOS system is the spine Anaboo uses to deliver every implementation. It's how we compress six months of AI consulting into a fast, repeatable, high-quality install.

The six AIOS workspaces

WORKSPACE	WHAT IT HANDLES
Intelligence	Research, competitor monitoring, market scanning, deep multi-source data gathering. The "what's happening out there" layer.
Writing Room	All written output — client letters, proposals, social posts, IC memos, email campaigns — in your voice, watermarked DRAFT until approved.
Production	Build things — apps, videos, diagrams, dashboards, thumbnails — from brief to final deliverable.
Operations	Orders, fulfilment, inventory, supplier communications, document processing.
Finance	Invoicing, expense tracking, cash flow, tax prep, reconciliation.
Admin	Coordination, compliance, recruitment, reporting, daily briefings, history tracking.

How it works

AIOS is agent-driven. Each workspace hosts specialist AI agents that know their zone and nothing else — so they stay focused and affordable. Agents coordinate through a central router. A compliance gate and privacy gate sit between every agent and every output. Nothing reaches a client until a human signs it off.

You interact with AIOS however suits you: a dashboard in your browser, Telegram messages on your phone, voice notes from the car, Slack threads with your team. The output is the same wherever you started.

Mobile equals six monitors

The office is wherever you are. AIOS was built mobile-first because the people who benefit most — founders, owners, partners, principals — don't work from one desk. On a flight, in a lunch meeting, at a Monday morning offsite, AIOS is the same powerful system.

What makes AIOS different

We don't replace your team

AIOS augments every role. Your senior people stop doing admin. Your junior people graduate to judgment work. No role disappears. Many improve.

We don't replace your software

AIOS sits underneath your Bloomberg, your CRM, your Addepar, your custody portal. It eats the public content you already consume and writes the documents you already write. Your existing stack stays where it is.

We don't sell you tools

AIOS is delivered done-for-you by Anaboo. You don't build it. You don't maintain it. You use it.

We stay after the install

AI models drift. Prompts decay. Data changes. "AI Drift Maintenance" — included in every retainer — keeps your AIOS producing the quality it did on day one, forever.

"Stop running your business. Start owning it."

— Anaboo AI

02

The Opportunity

Why wealth and asset managers. Why now. Why AIOS is built specifically for this world.

The problem — surrounded by data, starved of time

You're not short of data. You're drowning in it.

Bloomberg at \$24,000 a year a seat. Reuters. FactSet. Interactive Brokers. Addepar or a spreadsheet. Your CRM. Three custodian portals. Seven WhatsApp groups. A stack of YouTube macro shows you never quite have time to watch. Earnings calls you meant to listen to. A Reddit thread someone flagged at 11pm. A Citrini report that reshaped a sector overnight. An inbox filling with capital calls, K-1s, and KYC reminders.

You have the terminals. You have the intelligence. What you don't have is **one layer that ties it together in the field, on a flight, at 06:30 before the open**, so your day is about conviction and clients, not copy-paste.

The measurable daily cost



The gap in today's AI-for-finance market

The top of the market is being taken. Rogo (\$75M Series C from Sequoia), Hebbia (customers include KKR, OHA, New Mountain), AlphaSense, BlackRock Aladdin's Copilot — these target Wall Street investment banks, global hedge funds, and bulge-bracket PE shops.

Addepar set up Singapore as its APAC hub in 2025, backed by EDBI (Singapore's government venture arm), serving \$15M+ AUM RIAs and up.

Mastro is the default family office platform globally, with DocAI for alt-investment extraction.

None of them serve the 1–10 person EAM. None of them serve the \$50M–\$500M single family office. None of them serve the owner-principal who wants AI in the field, not back at the server.

That's where AIOS sits. We don't compete with Addepar. We sit underneath it. We don't replace Bloomberg. We eat the public content you already watch, and we write the drafts you already write, in your voice, wherever you are.

THE AIOS WEDGE IN ONE LINE

Addepar is where your numbers live. AIOS is where your day happens.

03

The 10 Transformational Skills

Ten skills designed around the daily life of an Asset Manager, External Asset Manager, Wealth Manager, Single Family Office, or Multi-Family Office.

At a glance

Eight of the ten skills came directly from a practitioner who uses Bloomberg, Reuters, and Interactive Brokers terminals every day. He gave us his 8 real pain-points over WhatsApp on 10 April 2026. Skills 9 and 10 fill gaps MAS requires even where the practitioner didn't ask.

#	SKILL	DAILY TRIGGER	PRIMARY WIN
1	Pre-market Macro Agent	07:00 SGT daily	Wake caught up
2	Social Signal Agent	07:00 + 13:00	No more doomscrolling
3	Mega-Cap Weekly Tracker	Friday 18:00 SGT	Weekend prep done
4	Daily Long/Short Screen	07:00 + 08:00	Ideas before open
5	Move-to-Meaning Event Agent	Event-driven, 3–5× daily	Never miss a spike
6	Megatrend Radar	Monday 07:00	Long-arc conviction
7	Macro-Event Probability Agent	Live + 07:00 digest	Sector sensitivity at hand
8	Alts-Doc Pipeline	Continuous, digest 18:00	Ops team 3× capacity
9	Client Comms Drafter	Event-driven, 1–5× daily	In your voice, MAS-safe
10	Compliance Co-Pilot (MAS)	Continuous	Audit-ready always
Total reclaimed per person		10 hours / week, every week	520+ hrs / year

What follows is a one-page description of each skill: what it does, when it fires, what it gives you, and why it matters to your book.

01 Pre-market Macro Agent

"Sleeps through US close. Wakes the PM up caught up."

Overnight, AIOS ingests 5–10 YouTube macro shows you already watch (Dumb Money Live, MacroVoices, Figuring Out Money, Business with Brian, Unrivaled Investing), plus 20 hand-picked X feeds, plus central bank calendars (Fed, ECB, BoJ, MAS, PBoC), plus overnight price action on SGX, HSI, Nikkei. At 07:00 SGT, one page lands on your phone: top 5 themes, top 3 trade-relevant calls, named stocks with sentiment, day calendar.

Input: channel/feed lists, central bank calendar, ticker watchlist, your voice sample · **Output:** WhatsApp brief + email with sourced links · **Integration:** v1 standalone (Supadata, X, SMTP, WhatsApp Business) · **MAS:** internal research only

02 Social Signal Agent

"Reads Reddit, X, LinkedIn so the PM doesn't have to."

Monitors curated subreddits (r/wallstreetbets, r/SecurityAnalysis, r/investing), X lists (macro, single-stock, quant), LinkedIn sector feeds. Clusters posts into themes, detects anomalous volume (WSB pile-on, coordinated FinTwit chatter). Twice daily — pre-market and post-open — a summary of emerging narratives with ticker mentions, sentiment, and link-outs.

Input: subreddit + X list + LinkedIn follow configuration · **Output:** "Social Tape" feed + 08:00 digest · **Integration:** v1 Reddit API + X/Grok + Firecrawl · **MAS:** internal; never auto-posts; never quotes PII

03 Mega-Cap Weekly Tracker

"What mattered this week. What's structurally changing."

Friday 18:00 SGT: AIOS tracks your 10 mega-cap names (MSFT, AAPL, NVDA, GOOG, AMZN, META, TSLA, TSM, ASML + one rotating). Pulls material news, earnings, analyst revisions, competitor moves, regulation, insider transactions, unusual options. Three headers per name: developments, moats (stronger or weaker), disruption (what's coming). Explicitly NOT ratios — this is the qualitative narrative you share with clients.

Input: ticker list, news APIs, earnings transcripts, social feed · **Output:** single markdown report + 10 per-ticker cards · **Integration:** v1 public news + OpenBB · **MAS:** internal research

04 Daily Long/Short Screen

"Two ranked shortlists on your desk before the open."

Every morning, two screens run. LONG: US + global large/mid-cap with technical breakout AND fundamental support (positive revisions, guidance raises, margin expansion). SHORT: technical breakdown only, with the bearish thesis scraped from analyst reports, FinTwit, and short-seller research (Citirini, Hindenburg, Muddy Waters where public). Top 20 longs, top 20 shorts, one-pagers.

Input: universe, Polygon/OpenBB data, curated bear-thesis sources · **Output:** 2-page screen + 1-click draft IC memo on any name · **Integration:** v1 Polygon + QuantStats + Riskfolio · **MAS:** internal screen; short thesis attributed

05 Move-to-Meaning Event Agent

"Stock moved 8%. Here's why. Here's your framework."

When any watchlist name moves more than 2σ on 60-day vol intraday, the agent fires. It pulls 24-hour news for the ticker, sector, and macro drivers, scrapes earnings-adjacent data, checks prediction-market odds if macro-driven, generates a rationale with 3 bullets and a decision framework: continue to hold / add / trim / do nothing. Framework, not instruction. Your judgment stays yours.

Input: watchlist, live price feed, news, prediction markets, positions · **Output:** push notification + rationale + optional IC draft · **Integration:** v1 Polygon + news scrape; v2 IB gateway · **MAS:** framework not instruction; all output logged

06 Megatrend Radar

"The 10 big arcs. Who's exposed. Where it correlates."

Monday 07:00 SGT: AIOS tracks 10 named megatrends (AI infra, GLP-1s, nuclear, defence, water, ageing demographics, Asian re-industrialisation, private credit, stablecoins, EM sovereign debt — customisable). Per trend: 5-sentence state-of-play, top 5 listed plays by region, top 5 private players to watch, correlation heat-map, key risks, upcoming catalysts.

Input: curated trend definitions, news, research transcripts, PitchBook (v2) · **Output:** weekly deck + correlation dashboard · **Integration:** v1 public data + OpenBB · **MAS:** public info only; no inside data

07 Macro-Event Probability Agent

"Fed cuts 50bp next meeting — probability + which sectors move how much."

Maintains a live board of 15–25 tracked macro events (Fed, ECB, BoJ, MAS, key data prints, elections, OPEC, geopolitical). Probability from Polymarket and Kalshi, overlaid with consensus surveys. Per event: sensitivity table showing historical response of S&P sectors, SGX sub-indices, commodities, DXY/JPY/CNH. When probability shifts, alerts fire.

Input: Polymarket/Kalshi APIs, economist surveys, Polygon historical · **Output:** dashboard + alerts + weekly "what's priced in" note · **Integration:** v1 standalone; v2 position book overlay · **MAS:** historical pattern, not prediction

08 Alts-Doc Pipeline

"The email folder fills. The database stays current."

Monitors a designated inbox, SharePoint, or shared drive. Every incoming document — capital call notice, distribution notice, K-1, quarterly report, side letter, GP update — is classified, extracted (Docling for PDFs), mapped to the right fund in CRM, fields populated, anomalies flagged (wrong wire instructions, unusual fee calc, waterfall error). Daily ops digest. 30-day capital-call cash forecast.

Input: inbox or drive integration, fund master list · **Output:** CRM updates + anomaly queue + daily digest · **Integration:** v1 drive + Docling; v2 GP portals + custody feed · **MAS:** human approves wires & SARs; AI classifies + queues

09 Client Comms Drafter

"One idea → IC memo + client letter + WhatsApp, in your CIO voice."

Given a source piece (IC memo, research note, trade rationale) and a firm voice corpus (5–20 past letters), AIOS drafts three versions: (a) IC-length with full caveats, (b) client-letter length in the CIO's voice, (c) WhatsApp 3-bullet. Every version watermarked "DRAFT — FOR REVIEW." On approval, fires to CRM and archives in compliance. Also rewrites client-reply emails in firm voice.

Input: source doc, voice corpus, client segmentation, policy prompts · **Output:** 3-version draft + approval workflow + audit log · **Integration:** v1 standalone + SMTP + WhatsApp; v2 CRM · **MAS:** every draft DRAFT until human sign-off; full archive

10 Compliance Co-Pilot (MAS-aware)

"The part-time compliance officer, with infinite capacity."

Continuously scans every outgoing client document for potential-recommendation-without-disclosure, undisclosed conflict, or prohibited language. Maintains re-KYC calendar. Pre-fills CRS and FATCA classifications. Drafts annual MAS returns. Keeps a Veritas-ready AI-governance register of every AI output your firm has produced — ready for MAS inspection.

Input: outgoing client docs, KYC files, MAS calendar, firm policies · **Output:** flag queue + pre-filled returns + AI register + KYC alerts · **Integration:** v1 file-monitor + LLM; v2 KYC system + MASNET · **MAS:** AI flags, human decides; introspectable, auditable, versioned

Beyond the 10 — your whole business on AIOS

The 10 skills above are purpose-built for your wealth and asset management workflow. But remember — **AIOS is an AI Operating System for your whole business**, not a bolt-on for the investment team.

Your AIOS for Wealth Managers deployment ships with **another 16 pre-built business skills** that handle everything around the investment work — the marketing, client service, admin, and finance layers every firm needs but few firms have time to systematise. And when there's something specific to your firm that isn't covered, Anaboo builds custom skills for it.

THE FULL AIOS FOR WEALTH MANAGERS STACK

10 wealth-specific skills (the 10 above)

+ 16 general business skills (below)

+ unlimited custom skill development for whatever makes your firm unique

= a truly custom AI solution for **your** business, not a generic template.

The 16 general business skills (bundled in the WM module)

CATEGORY	SKILLS INCLUDED	COUNT
Marketing & Content	Blog writer · SEO writer · Social media poster (LinkedIn + X for principals/partners) · Email campaign writer	4
Sales & Proposals	Proposal writer · Follow-up emailer · Lead qualifier	3
Client Service	Ticket responder · Complaint handler (MAS-aware) · FAQ updater	3
Admin & Reporting	Meeting scheduler · Daily briefing · Report compiler · CRM updater	4
Finance	Invoice generator · Expense tracker	2
Total bundled in the WM module		16

Custom skill development — the part that makes AIOS truly yours

Every firm has workflows unique to it — a specific CIO reporting format, a proprietary deal screen, a bespoke pitch library, a particular way of onboarding UHNW clients, a custom house view document, an investment committee protocol nobody else uses. AIOS is designed so Anaboo can

build custom skills on top of the 26 pre-built ones, plugged into the same compliance, audit, and voice-corporate infrastructure.

That's the difference between "buying a tool" and "implementing AIOS." You don't adapt your business to the software. We adapt the system to your business.

"You don't adapt your business to the software. We adapt the system to your business."

— The Anaboo implementation philosophy

04

A Typical Day — Reimagined

Find your persona. See where your day changes. The time you reclaim. The weekends you keep.

Five personas. Five very different days.

AIOS was designed across five operator types we've watched at their desks. For each, we've mapped the day today and the day with AIOS side-by-side, with the specific skills that fire at each moment.

1. Asset Manager (AM) — institutional PM, boutique or mid-size firm

TODAY

- 06:30** Wake, scan overnight on phone, flick through 5 tabs
- 07:00** Coffee, open Bloomberg, dig into overnight news
- 09:00** SGX open, research, model updates. Interrupted each name move
- 11:00** Earnings call. Take notes manually
- 13:00** Lunch. Glance at Twitter
- 15:00** US pre-market — analyst notes, scan newswires
- 17:00** SGX close. Compile weekly Mag10 update
- 21:30** US open. Monitor. Check X for Fed cut probability
- 23:00** Still at desk, writing client note

WITH AIOS

- 06:30** Pre-market brief on phone, read in bed (Skill 1)
- 07:00** Coffee. Brief read. Mind clear
- 09:00** SGX open. Move-to-Meaning pings on $>2\sigma$ moves (Skill 5)
- 11:00** Earnings call. Transcript + sentiment auto-flow
- 13:00** Lunch. Social Signal digest in inbox (Skill 2)
- 15:00** Long/Short Screen surfaces top 20/20 with bear thesis (Skill 4)
- 17:00** Mag10 auto-queues Friday report. 5 min review vs 4 hours (Skill 3)
- 21:30** US open. Polymarket + Kalshi odds + sensitivities (Skill 7)
- 23:00** Client draft written in your voice, DRAFT, ready to approve tomorrow (Skill 9)

Reclaimed: ~2 hours/day (10+ hours/week). Bigger win: you don't go to bed behind.

2. External Asset Manager (EAM) — boutique, client-facing, multi-custodian

TODAY

- 07:00** Pre-market brief if you have time — rare
- 08:30** Log into 3 custodian portals for 40 clients' positions
- 09:30** Client meeting. Don't know what happened to 3 alts overnight
- 11:00** Trading / execution
- 12:30** Lunch with client. Missed news on Chinese EV position
- 14:00** Back-office: 4 capital calls, 2 K-1s, quarterly report
- 15:30** Draft 12 client WhatsApps manually
- 17:00** IC prep
- 18:30** Compliance: re-KYC, CRS pre-fill
- 20:00** Home. Check US open

WITH AIOS

- 07:00** Pre-market brief before kettle boils (Skill 1)
- 08:30** Consolidated position view (v2) or CSVs (v1)
- 09:30** Client meeting. AIOS pre-briefed you on phone walking in
- 11:00** Trading / execution (unchanged — human judgment)
- 12:30** Lunch. Move-to-Meaning pinged you, talking points ready (Skill 5)
- 14:00** Alts-Doc Pipeline extracted everything; anomaly flagged (Skill 8)
- 15:30** Comms Drafter: 12 in your voice, DRAFT, 20 min total (Skill 9)
- 17:00** IC memo drafted from your research
- 18:30** Compliance Co-Pilot flagged 3 re-KYCs, CRS pre-filled (Skill 10)
- 20:00** Home. Check US open if you want. Agent tells you if it matters

Reclaimed: ~2 hours/day (10+ hours/week). Bigger win: your weekends come back.

3. Wealth Manager (WM) — advisor at private bank or independent

TODAY

- 07:30** Market summary via firm email
- 08:30** Prep three client meetings from CRM notes
- 09:30** Three client meetings. Return to follow-up mountain
- 12:30** Lunch (often client). No admin time
- 14:00** Follow-ups, proposals, personal emails
- 16:00** Admin: KYC, compliance, suitability reviews
- 17:30** Prep tomorrow

WITH AIOS

- 07:30** Market summary + Pre-market Brief tailored to your book (Skill 1)
- 08:30** Three client briefs pre-drafted on mobile
- 09:30** Three client meetings. Better prepared. No-one forgotten
- 12:30** Lunch. Follow-ups drafting in background (Skill 9)
- 14:00** Review + approve drafts. Proposals templated. Send
- 16:00** Compliance Co-Pilot shows what's due, pre-filled (Skill 10)
- 17:30** Tomorrow's brief drafting

Reclaimed: ~2 hours/day (10 hours/week). Bigger win: every client feels remembered.

4. Single Family Office (FO) — CIO or principal's advisor

TODAY

- 07:00** Check portfolio across 4 custodians + direct + real estate + cash
- 08:30** Principal wants a read on gold. You search 6 sources
- 09:00** Deal review. 3 GPs sent material overnight
- 12:00** Lunch
- 13:00** Ops: 7 capital calls, K-1s, quarterly reconcile. Half a day
- 16:00** Reporting: principal wants quarterly narrative
- 17:30** Next-day prep

WITH AIOS

- 07:00** Consolidated view — listed, private, RE, cash — one screen
- 08:30** Principal wants gold. AIOS pre-briefed 3 structures. 15 min (Skills 1, 6)
- 09:00** Alts-Doc Pipeline flagged fee anomaly on Fund B (Skill 8)
- 12:00** Lunch
- 13:00** Pipeline wrote wire queue for human sign-off. Anomaly review only (Skill 8)
- 16:00** Narrative drafted in principal's preferred style. 30 min vs day (Skill 9)
- 17:30** Tomorrow's brief drafting

Reclaimed: ~2 hours/day (10+ hours/week). Bigger win: the principal's questions are answered before they're asked.

5. Multi-Family Office (MFO) — team serving multiple principals

TODAY

- 07:00** Positions across 5 families
- 08:00** Team huddle — who's talking to which family
- 09:00** Queries: "What happened to my China tech?"
- 12:00** Lunch
- 13:00** Ops × 5 families — unmanageable without 3 ops staff
- 16:00** Consolidated reporting × quarterly. 3 days per family
- 17:30** Governance, compliance, KYC × 15 principals

WITH AIOS

- 07:00** Positions consolidated per family. Variances flagged
- 08:00** Huddle. 3 families with active deals surfaced (Skill 5)
- 09:00** Queries auto-drafted from house view, per family (Skill 9)
- 12:00** Lunch
- 13:00** Pipeline runs per-family. 1 ops person = old team of 3 (Skill 8)
- 16:00** Reports draft themselves. Board-ready. Sign-off (Skill 9)
- 17:30** Per-family KYC calendar, CRS pre-fill, MAS filings (Skill 10)

Reclaimed: ~10+ hours/week per person, compounded across the team. Bigger win: one MFO team serves 40% more families with no new staff.

05

MAS-First by Design

Compliance isn't a bolt-on. It's the spine of the product.
Built for Singapore from day one.

Why MAS-first is a feature, not a tax

The Monetary Authority of Singapore has been ahead of every other major regulator on AI in financial services since 2018 — FEAT Principles, Veritas Initiative, MRMG, and the new P017-2025 AI Risk Management Guidelines issued on 13 November 2025.

Most AI-for-finance tools come from the US, where the regulatory regime is different. Retrofitting them for MAS is expensive and often unconvincing to your compliance team.

AIOS for Wealth Managers is architected for MAS from the first line of code. That means when your compliance officer asks how the tool handles fiduciary oversight, you have a real answer — not a vendor slide.

What AIOS ships with on day one

"DRAFT — FOR REVIEW" watermark on every client-destined output

No letter, email, WhatsApp, or proposal leaves the system without human sign-off by a licensed representative. The watermark is structural, not optional.

AI use-case register (Veritas-ready)

Per-firm, per-skill, per-use-case. Exportable for MAS inspection. Meets the materiality-classification requirement in P017-2025.

Full audit trail on every AI decision

Who prompted. What data was used. What model version ran. What output was produced. Who signed off. Retained for MAS-required minimum retention.

Model and prompt versioning

If an output is ever questioned, we can reproduce exactly what model and exactly what prompt created it, on the day it was created. "Why did the AI say that?" has a real answer.

Vendor due-diligence pack

SOC 2 equivalent, model cards, data flow diagrams, incident response policy. Shipped as a downloadable so your firm can onboard AIOS under MAS outsourcing rules in a day, not months.

Data residency — Singapore option

For tenants where data must not leave Singapore jurisdiction, AIOS offers in-country deployment with zero-retention API configurations.

What AIOS never does (non-negotiable)

- **Autonomous client advice.** Ever.
- **Autonomous trades.** Ever.
- **Autonomous KYC or AML decisions.** AI prepares. Human decides. Human signs.

- **Auto-send of marketing or client material.** Every outgoing piece goes through the Comms Drafter's approval workflow.

THE COMPLIANCE-OFFICER TEST

If your Head of Compliance takes a single look and says "no way," we've built the wrong product. AIOS is engineered so your compliance officer's answer is "show me the audit log" — and then "fine, we can work with this."

06

The Landscape

Who else plays in this space. Where they win. Where the gap is that AIOS fills.

We know the players. You should too.

AI-for-finance is crowded at the top. Here's the honest map of who does what — and why AIOS doesn't compete with any of them head-on.

PLAYER	WHAT THEY DO	WHO THEY SERVE	HOW AIOS RELATES
Addepar	Portfolio data consolidation + Addison AI Q&A	\$15M+ AUM RIAs; Singapore APAC hub 2025 (EDBI-backed)	We sit underneath. CSV import. Apply for partner programme.
Mastro	Family office platform + DocAI extraction	Enterprise family offices globally	Alts-Doc Pipeline competes directly at lower price + Singapore custodians.
Rogo	AI analyst "Felix"; \$75M Series C Sequoia	Investment banks, PE, enterprise AMs	Out of reach for 1–10 EAM. No competition at our tier.
Hebbia	Enterprise doc & research AI	KKR, OHA, MetLife, New Mountain, Latham	Enterprise-only. No SMB tier.
AlphaSense	Research agents across 500M+ docs	Asset managers (enterprise tier)	Strong at research; weak at compliance, comms, ops. Complementary.
BlackRock Aladdin + Copilot	Institutional portfolio + AI	Tier-1 institutional	Not our audience.
Bloomberg AI, FactSet AI	Terminal-gated AI over vendor data	Existing terminal customers	We're the layer between Bloomberg and your day.

The gap we fill

None of the players above serve the **1–10 person EAM** or the **\$50M–\$500M single family office**. None offer mobile-first. None are MAS-native.

That's a \$multi-billion underserved segment. AIOS is built for exactly this middle.

“Addepar is where your numbers live. AIOS is where your day happens.”

— the one-line positioning

07

The Roadmap

Transparent phasing. What ships when. What we integrate, and when we integrate it.

v1 → v1.5 → v2. No surprises.

Most AI-for-finance vendors promise everything on day one. We don't. We ship pure SaaS first, prove it, then layer in integrations as the value justifies. Here's the honest phasing.

v1 (0–3 months from pilot start)

Skills: 1 (Pre-market Macro), 2 (Social Signal), 3 (Mega-Cap Weekly), 9 (Client Comms Drafter), 10 (Compliance Co-Pilot)

Data: public content only — YouTube transcripts, X, Reddit, news APIs, SMTP, WhatsApp Business

Integration needed: zero custody plumbing

What you get: pilot-ready installation on your workflow in 90 days

v1.5 (3–6 months)

Skills: 4 (Daily Long/Short Screen), 5 (Move-to-Meaning Event), 7 (Macro-Event Probability)

Data: Polygon.io market data, Interactive Brokers APIs, Polymarket + Kalshi probability feeds, MAS-filing draft generation

Integration needed: Interactive Brokers — trivial; Polygon — trivial

What you get: the full investment-decision workflow, with prediction-market and scrape-informed signals

v2 (6–12 months)

Skills: 6 (Megatrend Radar, enhanced), 8 (Alts-Doc Pipeline), plus two anchor custodian integrations

Data: PitchBook / Crunchbase (if licensed), GP portals, direct custody feeds (DBS, SCB, UBS, Julius Baer, BOS, Credit Suisse)

Integration needed: one custodian = 2–4 weeks engineering; we prioritise the custodians your pilot cohort already uses

What you get: complete end-to-end AIOS, back-office included

What we will not assume in v1

- **Bloomberg API access.** Six-figure annual, gated. Not in v1. You keep your terminal.
- **FactSet / Refinitiv APIs.** Same.
- **Aladdin.** Out of scope for this segment.
- **Direct custodian SWIFT feeds.** v2 only, per custodian.

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The Pilot

Q2 2026. Ten firms. Hand-picked for fit. Direct line to Brett.

Join the Q2 2026 cohort

We're opening a pilot cohort of ten firms in Q2 2026. The cohort is hand-picked for fit — we want a spread of Asset Managers, External Asset Managers, Wealth Managers, Single Family Offices, and Multi-Family Offices, so every pilot informs the next.

What pilot members get

v1 pilot pricing

Significantly below v1 launch pricing. Price locked for 24 months.

Direct input into v1.5 and v2

Quarterly roadmap sessions. Your daily friction shapes the next release.

Priority on custodian integration

When we pick the two anchor custodians for v2, pilot-member custodians go first.

Direct line to Brett

Not a support queue. WhatsApp, email, or a 30-minute call, weekly if you want it.

MAS-readiness pack at cost

Outsourcing documentation, vendor due-diligence pack, and optional Singapore regulatory counsel memo at cost. We absorb the legal workstream on your behalf.

What we ask in return

- **Three 30-minute shadow sessions** in your first month so we see your actual workflow, not your described workflow.
- **Monthly written feedback** during pilot — 15 minutes, structured template.
- **A one-page case study** at the end of pilot, anonymised if preferred. We'll write it. You approve it.

IF THIS DOCUMENT RESONATES — TELL US

The next page is a ten-minute feedback form. Mark it up, sign your name, email it back. If you tick "yes, I'm in" on the pilot question, we'll book a 20-minute call.

 **Call Brett direct: +65 8914 1000**

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Your Feedback

Ten minutes. Ten bullets. Three short questions. Your reply shapes what we build.

Part 1 — The 10 skills

For each skill, tick one option that best reflects your view.

#	SKILL	TRANSFORMATIONAL	USEFUL	MEH	NOT FOR ME
1	Pre-market Macro Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Social Signal Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Mega-Cap Weekly Tracker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Daily Long/Short Screen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Move-to-Meaning Event Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Megatrend Radar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Macro-Event Probability Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Alts-Doc Pipeline	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Client Comms Drafter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	Compliance Co-Pilot (MAS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Part 2 — What we missed

The biggest daily pain we've missed is:

The one thing I'd pay for tomorrow if it existed is:

Part 3 — Your stack

I use:

- Bloomberg Reuters FactSet Interactive Brokers Addepar Masttro
 Aladdin Other: _____

My custodians are:

My team size:

- Solo 2-5 6-20 20+

Part 4 — Commercials

As a standalone module, I would consider paying:

- SGD <1,000/month per seat
 SGD 1,000–2,500/month per seat
 SGD 2,500–5,000/month per seat
 SGD 5,000+/month per seat
 Not interested at any price

Would you join the Q2 2026 pilot cohort for early access and input on v1?

- Yes, I'm in Maybe, tell me more No thanks

Part 5 — Your details (optional)

Name:

Firm:

Role:

Best contact (email or WhatsApp):

How to return this

Scan or photograph the marked pages and email to hello@anaboo.ai, WhatsApp Brett, or call direct on **+65 8914 1000**. Whichever is easier.

Reclaim the time. Keep the relationships.

This is what Anaboo AIOS for Wealth Managers was built for.

 Call Brett direct · +65 8914 1000

Anaboo AI

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"Live with passion & AI" — Brett Alegre-Wood, Founder