

CUSTOMER CASE STUDY

The Deck That Built Itself — and Automated a \$30,000 Workflow

How a wealth management firm automated its quarterly Investment Policy Committee Meeting Book from 40 hours to 10 minutes

Virginia RIA | July 2026 | Wealth Management

EXECUTIVE SUMMARY

A U.S. wealth management firm employed a part-time analyst whose primary responsibility was assembling the quarterly Investment Policy Committee (IPC) Meeting Book. Each quarter meant pulling data from multiple sources, formatting tables in PowerPoint, and cross-checking numbers across 57 slides. The role cost the firm roughly \$30,000 per year. Using AdvisorClaw, the firm automated the entire pipeline. What had been a 40-hour project now generates in 10 minutes from live market data, requiring only two manual inputs. That work is now automated. And the deck itself is better, with 21 focused pages instead of 57, consistent formatting, standardized risk metrics, and narrative commentary that didn't exist before.

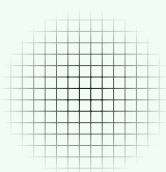
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1. THE PROBLEM

Each quarter, the firm's Investment Policy Committee required a comprehensive Meeting Book. The deck had to cover market index performance across U.S. domestic, international, emerging markets, and fixed income. It needed model portfolio returns with risk metrics including alpha, beta, Sharpe ratios, and capture ratios. It required SMA manager performance versus benchmarks, asset allocation tables, and risk-reward scatter charts with capital market lines.

Building this manually meant four grinding steps: data collection, spreadsheet work, PowerPoint assembly, and error checking. The entire process consumed roughly 40 hours to complete properly. The firm employed a part-time analyst at approximately \$30,000 per year whose primary job was producing these decks. That work is now handled by the system.



"You know, being in the business as long as I've been in the business, it was just a normal habit to live with the grind that you have to go through to get your work done for clients on a day-to-day basis."

One detail captures how broken the process really was. Morningstar tables and Excel-built index grids couldn't be easily exported into PowerPoint with their formatting intact. So the analyst would take screenshots, large screenshots of dense data tables. These had to be manually compressed to fit the deck's slide layout, producing visibly distorted images: blurry numbers, pixelated text, and color banding. The firm's Investment Policy Committee, stewards of client assets, was reviewing fiduciary recommendations on slides that looked like photocopies of faxes.

It wasn't incompetence. It was a rational response to a toolchain that offered no clean path from data to presentation. The analyst wasn't bad at their job. The workflow was.

The Merger Complication

A merger between the firm and another advisory practice created an unexpected problem. A miscommunication about who would maintain the data subscription meant that when it came time to build the Q2 2026 deck, the advisor found himself without access to the platform every prior quarterly deck had depended on.

He had two choices: manually rebuild from whatever free sources he could find, or find a better way.

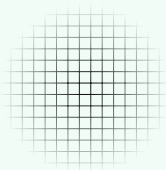


Figure 1: The Q1 2026 manual deck — 57 pages of PowerPoint-era formatting, blurry screenshots, and photocopied-fax aesthetics.

The old deck's title slide tells the whole story. "Investment Policy Committee Meeting Book — 1Q2026." No branding. No design system. Just a dated PowerPoint template and a page count that screamed redundancy.

2. THE SOLUTION

AdvisorClaw is an AI agent platform that combines large language models with file system access, code execution, and browser automation. The advisor described what he needed in plain English: a quarterly IPC deck built from free public data, matching the format and analytical depth of the original. AdvisorClaw understood the domain, asked clarifying questions about periodicity and benchmark methodology, and built the pipeline. No code was written by a human.



“When I heard AdvisorClaw was going to build our IPC book, I was like, 'Yeah good luck. This thing's gonna work.' I was absolutely amazed at the finished product. All I had to do was tell it what I was looking for and give it the IPC book. It asked a few clarifying questions — about periodicity, benchmark methodology, where to source the data. I gave it the quarterly returns on my models. It pulled everything else it needed from the internet and the previous quarter's deck. Then it ran with it.”

The result is a fully automated pipeline. Live data pulls from Yahoo Finance for all index ETFs, benchmark proxies, and individual holdings. Automated computation of weighted model returns, benchmark composites, and quarterly risk metrics. A professionally styled deck rendered directly to a 16:9 landscape PDF with institutional-grade typography and design. And a modular data architecture where quarterly updates require changing only two numbers.



Figure 2: The before and after. **Left:** Q1 manual deck — letter format, 57 pages, PowerPoint-era design. **Right:** Q2 automated deck — 16:9 landscape, 21 pages, professional typography.

The comparison is stark. Same analytical content, same committee, same fiduciary responsibility. But one looks like a compliance document from 2003, while the other looks like it came from an institutional design team.

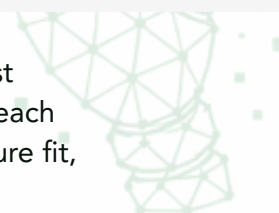
3. THE BUILD

Producing Index Data Without a Paid Subscription

The original deck had always sourced index data from a paid analytics platform. Without access, the only viable free alternative was Yahoo Finance, which provides ETF total return data but not direct index-level returns for most benchmarks.

The challenge was to map each of the roughly 40 indices in the deck to the best available ETF proxy. This wasn't as simple as picking the most popular ETF for each index. AdvisorClaw conducted an analysis evaluating each candidate on exposure fit, tracking error from fees, and data availability.

Some indexes presented unique challenges. MSCI AC Far East has no direct ETF, so AdvisorClaw built a synthetic proxy using a 60/40 blend of EWJ and AAXJ. Russell 2500 Growth/Value have no dedicated ETFs, so VBK and VBR were selected as closest available proxies. The Credit Suisse Hedge Fund Index was discontinued, so AdvisorClaw stitched together EHFI 400 data with QAI ETF returns to create a continuous proxy series.



Data Sources & Methodology

Index Proxies, Calculations, and Disclaimers

U.S. DOMESTIC INDICES

- S&P 500 TR sourced from index directly ("SP500TR") — matches Morningstar methodology.
- DJ Composite Average TR provided via DIA (SPDR DJIA ETF) — covers the 30 Industrials, ~80% of composite by weight.
- Russell 2000 Growth/Value provided via IUSG/IUSV (CRSP benchmarks, not Russell).
- Russell 2500 Growth/Value provided via VBK/VBR (CRSP benchmarks, not Russell).
- Russell 2500 TR (SMMD) inception 2017 — 10Y not available.
- All other Russell slices use corresponding (Shares Russell) ETFs.
- All returns are total return, 3Y/5Y/10Y are annualized. Data via Yahoo Finance.

INTERNATIONAL & EMERGING MARKETS

- MSCI AC Far East provided via 60% EWJ (Japan) + 40% AAXJ (Asia ex-Japan) synthetic blend.
- MSCI AC Europe FR provided via IEUR (iShares total return ETF) — returns higher than price return by dividend yield.
- MSCI AC Asia / AC Asia Ex Japan provided via AAXJ (IM variant, slightly broader than standard index).
- Frontier EM and Frontier Markets rows removed from Q1 deck due to unreliable ETF proxies.
- All returns are total return (ETF data). 3Y/5Y/10Y are annualized. Data via Yahoo Finance.

FIXED INCOME

- Bloomberg Government 1-3Y — SHY (iShares 1-3Y Treasury). Direct match.
- Bloomberg Government 1-5Y — IEI (iShares 3-7Y Treasury). Maturity mismatch: IEI starts at 3Y, not 1Y. Best available proxy — no pure 1-5Y Treasury ETF exists.
- Bloomberg Credit 1-5Y — IGSB (iShares 1-5Y Investment Grade Corporate Bond). Direct match.
- FTSE Emerging — EMB tracks J.P. Morgan EMBI Global Core, not FTSE. Same asset class, different index family.
- All other ETFs track their corresponding Bloomberg index or a close variant.
- All returns are total return, 3Y/5Y/10Y are annualized. Data via Yahoo Finance.

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APPENDIX

Figure 3: Data Sources & Methodology — ETF proxy mappings and methodology notes for producing index-level returns from free data sources.

The resulting ETF proxy map was validated against known index data and locked in. It produces index-level returns that match paid-platform data within basis points. The firm no longer needs the subscription.

The Alpha/Beta Discrepancy

During the build, AdvisorClaw detected something odd. Alpha and beta figures for the same models appeared differently on different slides of the Q1 manual deck. On the model performance summary page, the Growth Model showed an alpha of -1.36 and beta of 0.41, but the risk-reward scatter chart pages implied different numbers.

The initial assumption was a methodology difference, but AdvisorClaw's investigation revealed something simpler and more concerning. Different slides were using different periodicity. Some calculations used monthly return observations, while others used quarterly. Neither was mathematically wrong, but they produced meaningfully different results.

AdvisorClaw standardized everything to quarterly frequency across all pages. Every alpha, beta, Sharpe ratio, and capture ratio is now computed identically, from the performance summary table to the scatter charts to the appendix methodology notes.

Figure 4a: Q1 manual deck — SMA Model Portfolio Performance page.
Growth Model alpha: -1.36, beta: 0.41.

SMA Model Portfolio Performance/Comparison (as of 3/31/2026)									
Product Name	Alpha S&P 500 3 Year	Beta S&P 500 3 Year	Std Dev 3 Year	Sharpe 3 Year	ROR Latest Qtr	ROR YTD	ROR 1 Year	ROR 3 Year	ROR Since Inception
- Growth Model	-1.36	0.41	7.16	0.56	-0.39	-0.39	10.24	8.92	8.43
- Growth Benchmark	-0.37	0.76	10.16	0.94	-2.67	-2.67	16.39	14.67	7.64
- Enhanced Income Growth Model	0.33	0.34	7.01	0.69	0.49	0.49	9.74	9.80	7.88
- Enhanced Income Growth Benchmark	-1.43	0.53	7.85	0.70	-1.72	-1.72	11.48	10.48	7.52
- Income Growth Model	0.23	0.34	6.69	0.69	-0.38	-0.38	8.42	9.59	7.20
- Income Growth Benchmark	-1.43	0.53	7.85	0.70	-1.72	-1.72	11.48	10.48	7.52
- Conservative Growth Model	-0.16	0.33	6.66	0.63	0.22	0.22	8.97	9.11	6.93
- Conservative Growth Benchmark	-1.84	0.47	7.19	0.60	-1.49	-1.49	9.91	9.22	7.10
S&P 500 TR USD	0.00	1.00	12.06	1.07	-4.33	-4.33	17.80	18.32	11.10
Russell 2000 TR USD	-4.33	0.99	19.38	0.48	0.89	0.89	25.72	13.05	10.98
Bloomberg US Agg Bond TR USD	-3.30	0.17	5.63	-0.19	-0.05	-0.05	4.35	3.63	6.48

Total Risk Reward 3-Year SMA

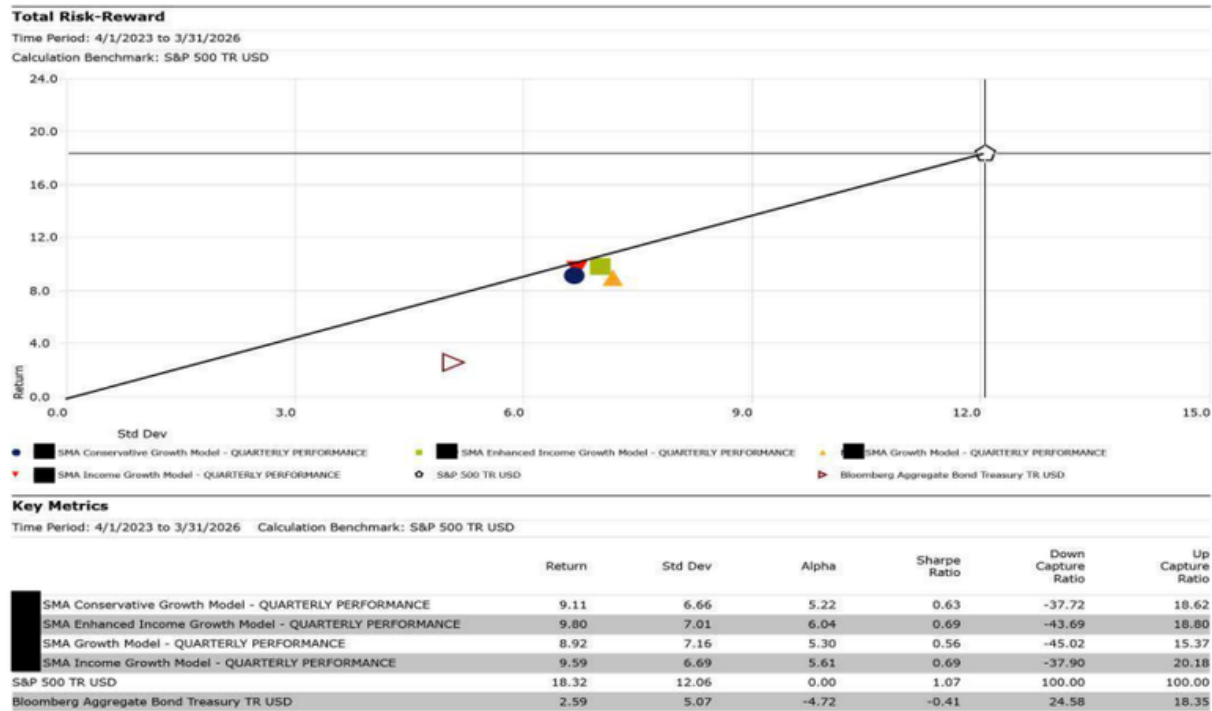


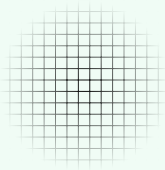
Figure 4b: Q1 manual deck — Risk-Reward 3-Year scatter chart page. Same Growth Model, different alpha/beta numbers implied by the scatter chart methodology.

The discrepancy was invisible to the human eye, as both pages looked correct in isolation. Only by cross-referencing all calculations did AdvisorClaw spot the periodicity inconsistency. The automated deck now uses quarterly frequency everywhere.

Proactive Improvements: Narrative Summaries

The original manual deck's market index pages were dense tables of returns. Nineteen rows of U.S. domestic indices, sixteen rows of international and emerging market indices, and seven rows of fixed income indices. Useful data, but it asked the reader to interpret raw numbers without context.

Without being asked, AdvisorClaw added narrative summaries above each index table. This wasn't a generic AI making lucky guesses. AdvisorClaw was purpose-built for financial advisors and wealth managers. It understands what an IPC committee needs: not just numbers, but the story behind them.



"U.S. equities posted mixed results in Q2 2026, with the S&P 500 TR returning +5.54% as large-cap growth names rebounded from Q1's selloff. Small caps continued to underperform, with the Russell 2000 returning -2.13% for the quarter amid persistent concerns about interest rate sensitivity in regional banks and commercial real estate exposure."

Cutting the Fluff

Rebuilding the deck from its data sources rather than copying the previous quarter's PowerPoint revealed something the advisor had suspected but never had time to address. The 57-page manual deck contained significant redundancy: separate SMA and mutual fund model books, individual watch list pages for dozens of funds, and full-page manager profiles that added limited value to the committee conversation.

The automated deck consolidates everything into 21 pages. Same analytical content, zero filler. The advisor described it as "what the deck should have been all along."

ADVISORY FIRM

MARKET REVIEW

International & Emerging Markets

Total Return Performance — As of June 30, 2026

Q2 2026 International Market Summary: Emerging Markets led the international recovery — MSCI EM surged +21.09% and Asia ex-Japan delivered a blistering +24.37%, bringing their YTD returns to +25.69% and +28.61% respectively. Developed International (EAFE +8.64%, Europe +9.18%) posted solid but more muted gains. The BRICs remain the problem child — the only index negative across most periods including 5-year (-4.66% annualized). Natural Resources gave back nearly 10% in Q2 after its monster +20% Q1 run. REITs had a quietly strong quarter (+12.90%) and are solidly green YTD. June saw most intl indices pause as the U.S. rally moderated.

INDEX	TICKER	MONTH	QUARTER	YTD	1 YEAR	3 YEAR	5 YEAR	10 YEAR
MSCI AC Asia PR USD	AAXJ	+0.59	+24.37	+28.61	+46.75	+23.92	+6.86	+10.13
MSCI AC Asia Ex Japan PR USD	AAXJ	+0.59	+24.37	+28.61	+46.75	+23.92	+6.86	+10.13
MSCI AC Europe PR USD	IEUR	+1.02	+9.18	+8.08	+17.29	+16.24	+9.04	+9.93
MSCI AC Far East PR USD	BLEND	+0.74	+16.81	+21.57	+37.07	+20.59	+8.10	+9.78
MSCI ACWI Ex USA NR USD	ACWX	+0.61	+12.41	+14.65	+28.30	+18.92	+8.80	+9.81
MSCI ACWI NR USD	ACWI	-0.35	+14.18	+11.66	+23.93	+19.79	+11.09	+12.88
MSCI BRIC PR USD	BKF	-3.89	-4.41	-11.26	-5.19	+6.16	-4.66	+4.34
MSCI EAFE PR USD	EFA	+0.69	+8.64	+9.89	+20.19	+16.33	+9.04	+9.59
MSCI EM PR USD	EEM	+0.24	+21.09	+25.69	+44.59	+22.92	+6.89	+9.50
MSCI Europe NR USD	IEUR	+1.02	+9.18	+8.08	+17.29	+16.24	+9.04	+9.93
MSCI Frontier Emerging Market PR USD	FRDM	+0.99	+34.01	+43.45	+84.15	+35.88	+19.45	N/A
MSCI Frontier Markets PR USD	AFK	-7.12	-0.19	-3.93	+28.80	+21.80	+5.60	+5.37
MSCI US REIT PR USD	USRT	+3.15	+12.90	+17.72	+20.86	+12.25	+5.72	+6.07
MSCI World ex USA NR USD	ACWX	+0.61	+12.41	+14.65	+28.30	+18.92	+8.80	+9.81
MSCI World NR USD	URTH	-0.46	+13.32	+9.81	+21.41	+19.42	+11.62	+13.32
S&P Global Natural Resources PR USD	GNR	-8.48	-9.86	+8.32	+26.05	+10.99	+8.58	+9.63

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Figure 5: Q2 automated deck — International & Emerging Markets page with narrative summary. The index table now comes with context, not just numbers.

These narratives transform index pages from reference tables into briefing documents. Committee members get context before they dive into the numbers. This feature did not exist in any prior quarterly deck.

4. THE RESULTS

The transformation is quantifiable across every dimension that matters: time, cost, quality, and analytical depth. The automated deck doesn't just replicate the original. It improves on it in ways that weren't possible with manual assembly.

Metric	Before	After
Complete Deck Project Time	40 hours	10 minutes
Pages (Same Analytical Content)	57	21
Part-Time Role	\$30,000/year	Automated
Indices Mapped to Free ETF Proxies	40+ (paid platform)	40+ (Yahoo Finance)

But the qualitative shift matters more. Every risk metric uses the same methodology, every table uses the same formatting, and every page follows the same grid. The navy, gold, and charcoal color palette with Montserrat and Inter typography looks like it came from an institutional design team. There are no cross-page inconsistencies, no copy-paste mistakes, and no outdated period labels. And 21 pages deliver more actionable insight than the original 57.

ADVISORY FIRM

MODEL PORTFOLIO

Model Portfolios Performance

SMA Model Portfolio Performance/Comparison — As of June 30, 2026

PRODUCT NAME	LATEST QTR	YTD	1 YEAR	3 YEAR	SINCE INCEPTION	ALPHA 3 YEAR	BETA 3 YEAR	STD DEV 3 YEAR	SHARPE 3 YEAR
Model A	+5.54	+4.94	+9.97	+11.07	+8.43	+1.23	+0.3323	+6.15	+1.07
Model A Composite Benchmark	+11.37	+9.63	+19.30	+15.85	+7.64	—	—	—	—
Model B	+5.16	+5.45	+10.00	+11.40	+7.48	+2.00	+0.3048	+6.10	+1.13
Model B Composite Benchmark	+6.68	+5.41	+12.22	+11.22	+7.19	—	—	—	—
MARKET INDICES (FOR REFERENCE)									
Russell 2000 TR USD	+21.44	+22.56	+40.68	+18.46					
S&P 500 TR USD	+15.20	+10.21	+22.32	+20.61					
Bloomberg US Agg Bond TR USD	N/A	+0.41	+3.44	+4.05					

Note:

Model Q2 2026 returns computed from holding-level data (Yahoo Finance + SMA Provider returns). Risk metrics computed from quarterly model returns vs S&P 500 TR USD (monthly returns geometrically linked to quarterly). Benchmarks use static weights since inception with ETF total return data. Model returns are gross of fees. SMA Provider manager returns sourced directly from SMA Provider performance data.

Figure 6: Q2 automated deck — Model Portfolios Performance page. Standardized metrics, consistent formatting, institutional-grade design.

The performance summary page shows what standardization looks like in practice. Alpha, beta, and Sharpe ratios are all computed with the same quarterly methodology, presented with clean typography and consistent number formatting.

The risk-reward scatter charts are another example of what automation enables. In the manual deck, these charts were only available when sourced from the paid analytics platform. Without that subscription, the Q2 deck would have lost a key analytical tool. Instead, AdvisorClaw built them from the ground up with capital market lines, consistent quarterly methodology, and professional presentation.



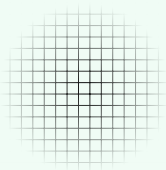
Figure 7: Q2 automated deck — Total Risk Reward 3-Year page. Capital market lines, standardized metrics, and professional scatter chart design.

The scatter charts show model portfolios plotted against their benchmarks, with capital market lines indicating efficient frontier expectations. This level of analytical visualization was previously only available through expensive third-party platforms.

5. THE BIGGER PICTURE

In the process of automating the deck, AdvisorClaw constructed monthly return series for every model holding. It geometrically linked individual security and SMA returns into model-level returns, and these series extend back to each model's inception, reaching 2008 and 2009 for the legacy models.

This created something that didn't exist before: a structured, queryable database of the firm's model performance history. Before, historical returns were scattered across old quarterly decks, Excel files, and SMA provider statements. Now the advisor can ask natural-language questions and get instant answers.



"How did Model A perform in Q4 2018?"

"What was our Sharpe ratio during the 2020 COVID drawdown?"

"Compare our 3-year rolling returns against the benchmark for the last decade."

This was never the goal of the project, but it's become one of the most valuable outcomes. The quarterly refresh process is now trivially simple: receive two numbers from the SMA provider, feed them to AdvisorClaw with a single prompt, and wait roughly five minutes for the PDF to render.

The work that consumed a part-time role costing approximately \$30,000 per year is now automated. The firm also avoids the cost of the data platform subscription. And it gained a queryable database of historical performance that turns ad-hoc analytical questions into instant answers.

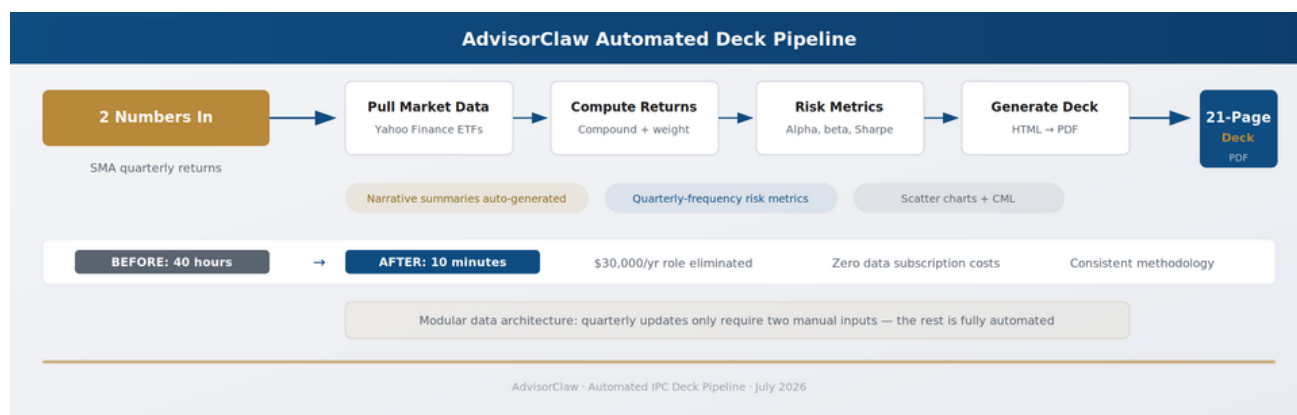
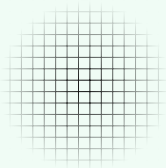


Figure 8: The AdvisorClaw Automated Deck Pipeline. Two numbers in, 21-page deck out. Forty hours to ten minutes. A \$30,000-a-year workflow automated. Zero data costs. Consistent methodology everywhere.

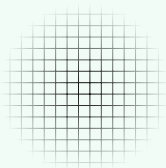
The pipeline diagram shows the entire transformation. What was a 40-hour manual project is now a 10-minute automated workflow. The only human inputs are two quarterly SMA returns from the provider.

6. ADVISOR PERSPECTIVE



"It's freed up my staff to actually pay attention to clients. So much more client time from different points within my organization."

The advisor's first test of AdvisorClaw's analytical depth wasn't the deck. It was a manager research exercise. He asked it to find the best managers in large cap, mid cap, and small cap. The kind of due diligence that typically takes his team six hours and requires paid data subscriptions. AdvisorClaw did it without accessing any of them. In each category, the managers it recommended matched what his team had already identified internally, sometimes exactly, sometimes closely. And it surfaced one new name worth investigating.



"When it did that without a lot of help from obvious sources of where to get it and still came up with the same answer as we did two out of three times with minimal instruction, I knew that was it. I knew this was changing business forever."

The story isn't about replacing people with software. It's about eliminating work that shouldn't exist in the first place: manual data pulls, screenshot gymnastics, cross-page error checking, and formatting that degrades with every copy-paste cycle. The analyst wasn't bad at their job. The workflow was. And now the workflow is gone.



For video walkthroughs of this tool, visit:

advisorclaw.ai/resources

