commit | roeto

Roeto Transforms Financial Advisory Operations with Agentic AI



// ABOUT ROETO

Roeto, part of IBI Investment House, is an advanced digital workspace designed for insurance agents, financial advisors, wealth managers, and back-office teams. Evolving from a traditional CRM into a comprehensive, all-in-one management platform, Roeto centralizes insurance policies, pension funds, investments, financial products, customer information, and business processes into a unified environment. By combining intelligent automation, reporting, team collaboration, and AI-powered virtual assistants, the platform provides financial professionals with a holistic view of their clients' portfolios while simplifying complex operational workflows. Through its innovative approach to financial management, Roeto empowers organizations to improve operational efficiency, reduce administrative workloads, identify business opportunities, and deliver more proactive, personalized customer service.

// CHALLENGES

Financial advisors often manage hundreds of clients with minimal administrative support. Manual workflows, fragmented client information, and high back-office costs leave little capacity for proactive engagement, and smaller agencies often lack access to advanced analytics and automation tools.

Roeto set out to evolve its CRM into an AI-powered platform that would raise advisor productivity, automate administrative work, and support growth without adding operational headcount.

Key challenges included:

- Advisors spent considerable time preparing for meetings, reviewing portfolios, consolidating information, and documenting follow-ups.
- Client data spread across multiple systems made portfolios hard to see in full and opportunities hard to identify.
- Sensitive financial data required strong protection, controlled system access, and strict regulatory compliance.
- Reliance on back-office staff raised the cost of serving growing client portfolios and limited scale.
- The solution had to go beyond information retrieval and securely carry out tasks in existing business systems.
- CRM onboarding took about six weeks, delaying time-to-value and slowing customer acquisition.

// SOLUTION

Commit partnered with Roeto to build Teammate, an AI orchestration platform that turns Roeto's existing CRM into an operational assistant for financial advisors.

Teammate runs on AWS using Amazon Bedrock AgentCore, with Claude on Amazon Bedrock as the language model. Advisors use natural language to access consolidated client information, find opportunities, and prepare for meetings. Teammate can also carry out tasks in Roeto's connected systems once the advisor approves them.

Key capabilities include:

- A multi-agent architecture coordinates specialized AI agents and connects existing business tools through Amazon Bedrock AgentCore Gateway.
- Automated portfolio analysis flags opportunities such as insurance coverage gaps, management fee reductions, and outstanding client recommendations.
- Meeting briefs pull together client profiles, portfolios, policies, and outstanding tasks, cutting manual preparation and simplifying follow-up.
- API integrations let Teammate create tasks, schedule meetings, and update client records, subject to user approval.
- A natural-language interface opens existing financial data and business tools to every advisor, with less reliance on manual searches and specialized analytics tools.
- Access controls, monitoring, logging, and governance on AWS to protect financial data and support operational oversight.
- Structured testing against a curated Golden Dataset measures agent accuracy and guides continuous improvement.
- Agencies can adopt AI capabilities without a full upfront migration of their CRM environment.

Commit designed the architecture for security, scalability, and maintainability, so Roeto can expand its AI capabilities while keeping control of sensitive data and operational processes.

// CUSTOMER QUOTE

"We have big ambitions as a fast-moving software company, and we see Commit as our natural partner whenever we think about how to move ten steps ahead. With their extensive expertise and capabilities in AI, Cybersecurity, and Data, Commit brings tremendous added value. They don't just bring ideas and technology to the table. They help us take those ideas forward and turn them into real products, built to the highest standards."

Gilad Kariv · CEO, Roeto

// RESULTS

Working with Commit, Roeto now has an AI-powered operational platform that improves access to financial information, simplifies administrative workflows, and helps advisors manage client relationships more efficiently.

Key outcomes include:

- Onboarding dropped from about six weeks to two, giving agencies earlier access to AI capabilities.
- Estimated savings of 43 to 120 minutes per advisor per day on information retrieval, meeting preparation, and administrative work.
- Projected capacity and productivity gains of 30% to 50%, so advisors can cover more clients without a matching increase in back-office resources.
- Initial rollout to 800 financial agencies, with plans to reach 10,000 users by 2027.
- Advisors can use existing data sources and analytical capabilities through natural-language interactions.
- Built-in security and governance, including explicit user approval before write actions such as creating tasks or preparing email drafts.
- An AWS-based multi-agent architecture that supports additional automation, broader adoption, and future platform development.

By adding agentic AI to its existing CRM, Roeto is moving from traditional client information management toward a more proactive approach to financial advisory operations.

With Commit's expertise and AWS technologies, Roeto now has a scalable foundation for reducing administrative overhead, raising advisor productivity, and giving financial professionals more time for client relationships and higher-value advisory work.

Ready to Turn Agentic AI into Real Business Impact?

Discover how Commit can help you automate complex workflows, boost productivity, and build secure, scalable AI solutions tailored to your business.

Talk to Our AI Experts