

VOICE AI AGENTS FOR FINANCIAL SERVICES

Increase client acquisition while scaling high-quality service and outreach.

TRUSTED BY FINANCIAL SERVICES LEADERS



TURN MORE CLIENT CALLS TO CONVERSIONS



The Problem: FairFinCare struggled with inconsistent staffing and difficulty improving performance at their offshore contact center.

By deploying an agentic workflow to handle intake and call-routing tasks, they boosted conversions while ensuring compliance.

FINANCIAL SERVICES USE CASES

Qualify Product Leads

Book Advisor Meetings

Collect Client Payments

Answer Account Questions

Schedule Consultations

Follow Up On Applications

THE REGAL SOLUTION



Replaced voicemail and overflow queues with an agentic workflow, designed to ensure compliant call handling

Maximized advisor productivity by routing only eligible, high-intent callers to licensed financial advisors

Drove conversions and revenue with an agentic workflow, by increasing call containment

DRIVING OUTCOMES

2X

Conversion Rate With Voice AI Agents

95%

Improvement in Transfer Rate

47%

Savings in Cost per Transfer

“With AI agents handling intake, **our advisors can focus on the conversations that matter:** driving revenue and keeping customers loyal.”

VP of Customer Operations

[Request a Demo](#)

[See how you can use AI Agents for Financial Services](#)

