

# GenerativeAgent® for banking

Deliver fast, compliant customer service across banking use cases—24/7.

In financial services, customer expectations are rising—but so are the stakes. ASAPP's GenerativeAgent helps financial institutions automate high-volume service interactions while maintaining trust, safety, and compliance.



## What GenerativeAgent can do for FinServ

Whether it's fraud reporting, product questions, or locked accounts, GenerativeAgent delivers accurate, secure responses with built-in human collaboration.



### Banking & account support

- Check account balance or recent transactions
- Report fraud or suspicious activity
- Resolve payment issues or transaction errors
- Dispute overdraft or maintenance fees
- Report lost or stolen cards
- Offer targeted promotions
- Start loan application processes
- Provide interest rate and product information
- Handle fund transfers between accounts



### Access & security

- Support for locked accounts and password resets
- Respond to suspicious login alerts
- Verify identity and send secure access links
- Update multi-factor authentication methods



### Investment & financial planning

- Change contribution amounts
- Request product and performance information
- Explore rollover options and fees
- Troubleshoot investment account issues

### Example

A customer spots a suspicious charge and initiates a dispute. GenerativeAgent confirms account details, freezes the card, files the dispute, and explains next steps—all without waiting on hold.

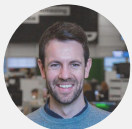
## Why GenerativeAgent works for banking

- Built for compliance: Includes human-in-the-loop oversight and redaction to protect sensitive data.
- Integrates with legacy systems: Uses existing APIs with minimal configuration required.
- Available anytime: Offers 24/7 service via chat or voice with consistent outcomes.
- Reduces fraud risk: Enables advanced authentication and faster resolution of high-security issues.

## Trusted by leading financial institutions

Top banks and investment firms use ASAPP's platform to deliver secure, scalable, and satisfying service—while improving containment and reducing time-to-resolution.

"We're a smaller team. We needed a vendor we could interact with frequently, one that empowers us to manage the bot ourselves, and one with real-time reporting we could use for root-cause analysis and executive updates."



**Harry Clapham**

Director of Operations Strategy and Enablement, Tangerine Bank  
During the 14th Annual Customer Experience Strategies Summit

## Take the next step

[www.asapp.com/get-started](https://www.asapp.com/get-started)  
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+1 (646) 386-8639

Take a product tour:

<https://www.asapp.com/product-tours>

Talk to GenerativeAgent:

<https://www.asapp.com/talk-to-genagent>

## About ASAPP

ASAPP is an artificial intelligence solution provider committed to solving the toughest problems in customer service. Our flagship product, GenerativeAgent®, is a platform built from the ground up to handle complex, multi-turn conversations with enterprise-grade performance, safety, and control. Because we automate what was previously impossible to automate, our AI-native® solutions deliver more than efficiency gains. They redefine the role of AI in the contact center and lay the groundwork for businesses to reimagine their customer experience delivery for the age of AI. Leading enterprises rely on ASAPP's generative and agentic AI solutions to dramatically expand contact center capacity and transform their contact centers from cost centers into value drivers.

