

PREPARED FOR DEVON HUNTER · JN BANK OPPORTUNITY

Practical AI for Financial Services

Relevant financial-platform experience, separate AI product work, and a controlled path for exploring high-value bank workflows.

Atlas Flow

Founder-led delivery

Human-reviewed automation

WHO WE ARE

Atlas Flow, built on an established delivery track record

Atlas Flow builds on more than 15 years of software delivery experience from its founder and team, including projects previously completed through Rich Technologies.

Those earlier projects are presented as founder and team experience, not as contracts completed by Atlas Flow LLC. Completed financial-sector work and separate AI product work are intentionally not combined into a claim that a bank AI system has already been delivered.

RELEVANT EXPERIENCE

Completed work, separated by evidence



COMPLETED FINANCIAL-SECTOR PROJECT

Financial platform delivery and integration

The team translated complex technical requests into a working product, addressed difficult full-stack design problems, and delivered a tool the client recommended. Client and system details remain anonymized; no unsupported performance metric is attached.

[View the project overview](#) →



COMPLETED AI PRODUCT WORK

Purpose-built GPT experiences

Public work includes Startup Mentor GPT and an MVP Cost Calculator GPT: focused AI experiences designed around a defined audience, curated guidance, and clear user outcomes rather than a generic chat interface.

Source: public portfolio work previously delivered through Rich Technologies by Atlas Flow's founder and team.

Case-study-style examples for a controlled pilot

These scenarios illustrate how an engagement could be structured. They are not claims of past delivery for JN Bank or another bank. The right pilot depends on discovery, approved data, existing architecture, and risk requirements.



AI-assisted lending document intake

SCENARIO

Loan and account-opening packages can arrive through multiple channels with missing fields, inconsistent naming, and supporting documents that require repetitive staff review.

PROPOSED WORKFLOW

- ✓ Classify each document against an approved document taxonomy
- ✓ Extract defined fields into a review workspace without updating the system of record automatically
- ✓ Flag missing, conflicting, or low-confidence information
- ✓ Route the complete package to an authorized employee for validation

PILOT MEASURES

- Review time per package
- Extraction accuracy
- Exception rate
- Staff override rate



Customer service request triage

SCENARIO

Requests arriving through email, forms, and contact-center notes can require manual reading and forwarding before the responsible team can begin work.

PROPOSED WORKFLOW

- ✓ Summarize the request and identify its likely intent
- ✓ Recommend a service queue based on approved routing rules
- ✓ Highlight urgency signals and missing information
- ✓ Require staff confirmation before reassignment or customer communication

PILOT MEASURES

- Time to first assignment
- Routing accuracy
- Reassignment rate
- Resolution turnaround



Policy and procedure knowledge assistant

SCENARIO

Employees may need to search across policies, procedures, product guidance, and operational notices before they can answer a question or complete a task consistently.

PROPOSED WORKFLOW

- ✓ Search only approved, version-controlled internal sources
- ✓ Answer with citations to the exact policy passages used
- ✓ Respect role-based access boundaries for restricted material
- ✓ Decline or escalate when the source material does not support an answer

PILOT MEASURES

- Search time
- Citation coverage
- Unsupported-answer rate
- Employee usefulness rating



Controls before automation

Atlas Flow does not assume a generic AI pattern is acceptable for a regulated workflow. Controls are defined with bank stakeholders before implementation.

- ✓ Use approved data sources and explicit data-retention boundaries
- ✓ Apply least-privilege access and role-aware retrieval
- ✓ Record inputs, outputs, approvals, overrides, and workflow state
- ✓ Route low-confidence or policy-sensitive cases to people
- ✓ Test quality, security, and operational impact before expansion

PHASED DELIVERY

Prove one workflow before expanding

01

Discover

Select one bounded workflow, document the baseline, and define what the system must never decide.

02

Pilot

Build with representative data, access controls, traceability, and a clear exception path.

03

Validate

Measure accuracy, turnaround, staff adoption, and operational risk against the agreed baseline.

04

Expand

Integrate additional systems or workflows only after the pilot meets its acceptance criteria.



Next step: a confidential workflow discussion

Identify one process with a clear owner, measurable baseline, bounded data set, and human approval path.