



Getting Started Guide

Ask Integrity

Ask Integrity is the first-in-the-industry, AI-powered digital assistant for agents. It combines data analysis with powerful intelligence and delivers it on-demand through Integrity.

Ask Integrity Offers:

- Client Information Summaries to help you know every client better, no matter how long you've work together.
- Call Summaries so you can easily review previous meetings and help you prepare for your next interaction.
- In-the-moment AI Prompts like Specialist Recommendations personalized to client history and preferences, so you can find the right plan for each situation.
- Secure Client Data Storage that gives you and your clients peace of mind

To use Ask Integrity, click the blue circle with the Integrity logo at the bottom right of the screen. Text prompts are available on the web, and voice prompts are available on the mobile app.

