Day in the life of a Bank Wealth Advisor

Sam is a wealth advisor whose bank just refreshed devices to Surface Laptop, Copilot+ PC























8AM

Sam opens the box and turns on his new Copilot+ PC, a Surface Laptop with a 15" touchscreen. With Windows Autopilot, Sam's device automatically connects to Microsoft Intune,* which automatically downloads the company's profile for wealth advisors, enabling the device with the bank's enterprise apps and compliance policies for work devices that are used in the office and at home.

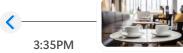
8:20AM

Minutes later, Sam's Laptop is ready to go. Sam uses its USB-C® with USB 4® / Thunderbolt™ 4 ports to dock to his external monitors for the ultimate home workstation.

With next-level performance expected from his new Copilot + PC, Sam immediately opens critical bank apps, Microsoft 365 productivity apps*, and Microsoft 365 Copilot⁴ to prepare customized content and reports for a prospective client meeting at 4PM. He also clicks the Copilot key³ to open Copilot to search, create, and summarize content faster.













4PM

As the meeting starts, Sam signs in instantly using passwordless biometrics in Windows 11 and Windows Hello Enhanced Sign-in Security to more securely connect to critical business apps and his proposal for Jackie. [Note: On select 15" models of Laptop sold in the US and Canada⁷, Sam can use the built-in smart card reader to securely sign in with his companyissued smart card.]

With his thin, ultra-portable Surface Laptop device in hand. Sam leaves home to meet Jackie, a new bank customer and prospective client for wealth management services, at a local coffee shop.

8:30AM-3:30PM

Given the hybrid work nature of Sam's job, he attends video meetings with colleagues and clients daily. Instead of investing in third-party video accessories, Sam uses his Surface Laptop's built-in features optimized for Teams* such as its 1080p Surface Studio Camera with Al-enabled Windows Studio Effects like automatic framing, eye contact, and background blur. High-quality Studio Mics with voice focus⁷ and Omnisonic® speakers elevate the audio experience.



4:30PM

Jackie decides to open a retirement account and a college savings account to prepare for her future. Sam enables Jackie to fill out the digital forms on his Surface Laptop.







Versatile, premium devices for innovative customer service processes, demanding analysis, easy team collaboration, and new Al experiences

Design

Product design grounded in humancentric research and rigorous testing, and dedicated to inclusivity and sustainability

4:02PM

Sam shows Jackie her proposal on the Laptop high-resolution 15" PixelSense™ touchscreen display. With anti-reflective technology¹³, Jackie and Sam can clearly read the proposal whether they are sitting indoors or outdoors

5PM

Sam returns home. Taking advantage of Intelligent Recap in Copilot in Teams⁴, he reviews summarized meeting notes and action items from today's calls, which is especially helpful for the meetings he was unable to attend while he was out visiting clients.

Microsoft Surface

To ensure wealth advisors deliver the best client experience, banks use Surface Laptop, a Copilot+ PC, for its:

- · Premium image
- Thin and lightweight design
- Choice of Intel® Core™ Ultra (Series 2) or Snapdragon X Series processors
- Choice of high-resolution 13", 13.5", or 15" touchscreen
- Anti-reflective display on select models¹³
- Long-lasting battery¹
- Secured-core PC
- Ability to maximize Microsoft 365* and Microsoft 365 Copilot⁴ investments

Surface differentiators

Security

Security from chip-to-cloud—a zero-trust security model that starts with Surface devices

Deployment & Management

Zero-touch deployment and unified management reduce costs and complexity for a distributed workforce¹²

Productivity

Disclaimers provided in Notes section