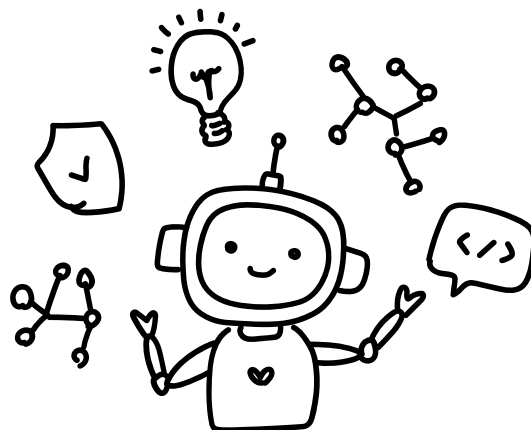# BUILDING A FINTECH
AI AGENT
WITH RETOOL

OVERVIEW

A fast-growing fintech company partnered with iView Labs to build an intelligent, AI-powered financial assistant. The tool needed to provide users with real-time financial insights, respond to queries like a financial advisor, and offer actionable advice - all through a secure, responsive internal dashboard. The team chose **Retool** to rapidly prototype and integrate multiple data sources and AI models.

CHALLENGES

Slow Development Cycles
Traditional BI tools delayed feature updates.

Secure API Integration
Needed safe, reliable access to financial APIs like Alpha Vantage.

AI Agent Training
Required consistent prompts to act like a domain expert.

Multi-AI Coordination
Ensured output consistency across GPT-4o, Claude, etc.

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SOLUTIONS

Dynamic Dashboard UI
Built with Retool for real-time chat, inputs, and custom data views.

Live Financial Data
Integrated Alpha Vantage API to display up-to-date company metrics.

AI Expert Agent
Used GPT-4o & Claude, trained with domain-specific rules.

Embedded Rule Book
Instruction engine inside Retool ensured consistent, compliant responses.

RESULTS

- **MVP launched in under 3 weeks**
- 100% customizable UI for internal teams to manage AI responses and financial data
- AI agent now handles 85%+ of financial user queries without human intervention
- Multiple APIs and data sources working in harmony
- Secured access control via Retool's permission layers

CONCLUSION

Retool allowed **iView Labs** to quickly deliver a robust, intelligent, and scalable fintech AI solution. The project proved that **low-code tools combined with advanced AI models** can offer enterprise-grade results in a fraction of the usual development time. This lays the groundwork for smarter financial platforms where AI and real-time data drive better decision-making.