

IPLTRM CASE SUMMARY

Fund-document AI beyond plain text

Private-market product, advisor and AI teams

Windmill's contribution

With IPLTRM, an affiliated Windmill venture, Windmill designed the question-answering experience and engineered document preparation and retrieval, including information held in tables and charts.

The workflow

The 2024 solution record describes graphical annotation in Python and chart/table extraction using GPT-4o. Prepared content was vectorised, indexed with FAISS and stored in Azure Blob Storage. Users could choose a topic or type a question to retrieve relevant fund information.

What the evidence establishes

This is historical implementation evidence. It does not establish a performance benchmark or verify the current demo release. A new institution needs evaluation on its own documents and users.

Example checks for your institution

Illustrative evaluation scenarios; no test results are reported here.

Table extraction and answer support. Ask about a fee in a table. Check the value, share-class label, conditions and supporting source together.

Unanswered question. Ask for information the material does not contain. Check that the system communicates the gap without inventing a value.

Changed document. Replace a fund document with a new version. Check which version the answer uses and whether the citation still supports it.

Access boundary. Test with users who have different document permissions. Check that an answer or citation does not reveal restricted material.

A scope around your next decision

Evaluation & Assurance can establish representative tests and identify the changes needed for your next release. Product Build & Scale is available independently for implementation or integration.

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