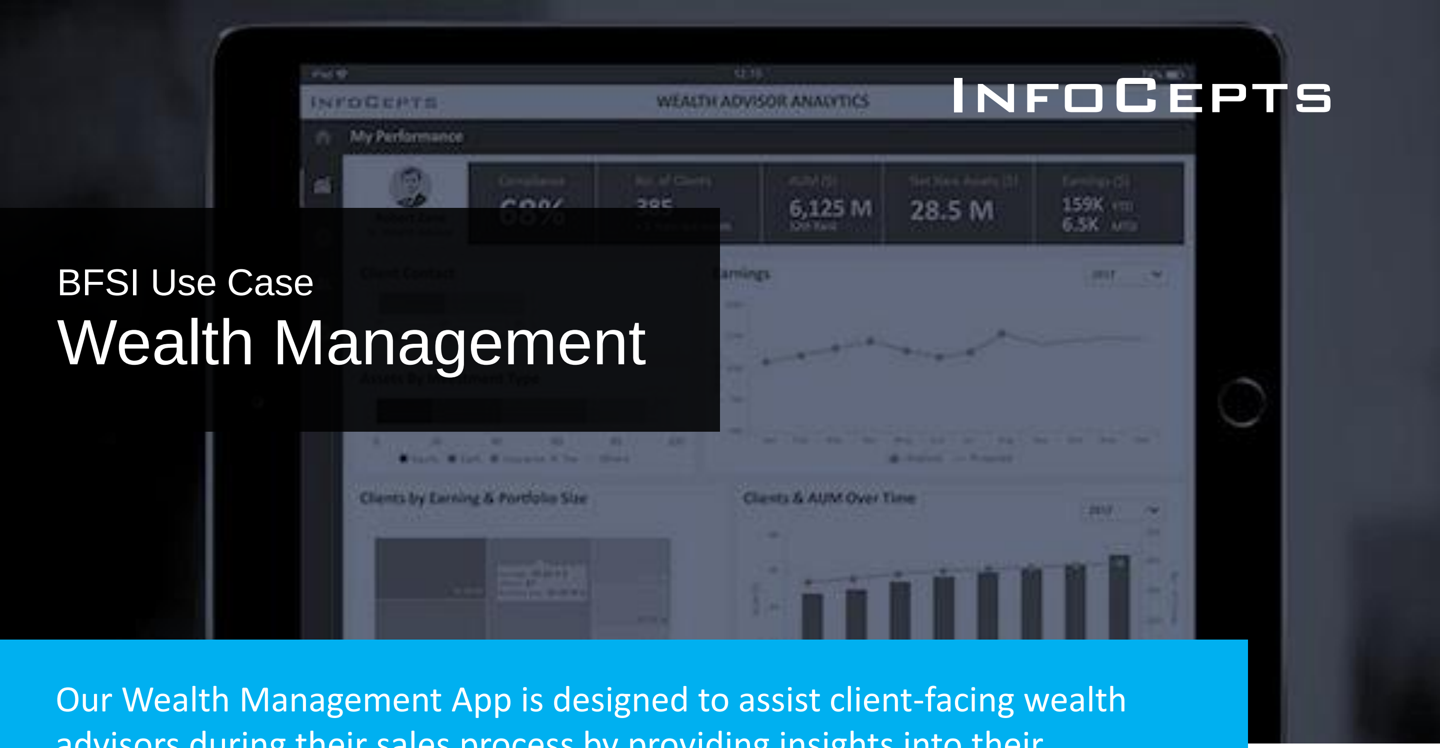

BFSI Use Case

Wealth Management

Our Wealth Management App is designed to assist client-facing wealth advisors during their sales process by providing insights into their performance, clients, and products on the go.

Key Performance Indicators

- Assets under Management (AUM): Total size of investments made by the clients under the management of the Investment firm
- Number of Clients
- Fund growth and performance
- Investment Fund Compliance

Users

- Wealth Advisors
- Relationship Managers
- Regional Managers

Benefits

- The app provides information on the size of investments for clients along with fund growth and performance
- It provides the Wealth Advisors a set of recommended products for clients based on their investment history preferences. This helps improve cross-sale revenues.
- It enables tracking of investment fund compliance requirements for all their advisors, using various parameters like client contact, documentation and information completeness
- It finds best-fit clients for new products filtering the client list based on– client type, client portfolio size, and last contact with the client
- It provides the ability to search for any client within the portfolio and get the most recent information about the relationship, client needs, goals, and portfolio performance