

iWealth

A Web-Based Wealth Management System

“A new generation of wealth management system”

iWealth is designed for financial institutions and insurance companies focused on the most profitable customer segment—high net worth individuals. Its customer-centric approach and one-to-one marketing features will help you to increase customer acquisition, retention, and profitability while by delivering outstanding customer service. The iWealth platform provides two key benefits, delivered on a Web-based platform:

- Allows personalized, convenient and proactive services from your producers that help your customers achieve their investment objectives
- Provides you with the right tools to identify your best customers for cross-selling opportunities and relationship pricing through instant profitability analysis by the system

Support a wide range of financial instruments

iWealth allows financial institutions to manage their customers' total net worth, including portfolio holdings such as mutual funds, bonds, equity-linked deposits, high-value deposits, stocks, insurance (available when used with iLife), and more.

Support multiple distribution and service channels

iWealth provides information to customers across various distribution channels including branch offices, Internet, wireless, call centers, IVR, etc.

Provide clients the information they need and want

iWealth provides the following CRM functions and features:

- A single, real-time view of a customer's total financial picture, including summary and detailed transactions
- A single consolidated customer statement
- A single view on multiple accounts and/or joint accounts
- Total customer value and profitability information
- Relationship and special promotional pricing
- Cross-selling information

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The simplicity of a Web-based platform, the breadth of a mature product

Day to day management of a wide array of products is supported, including mutual funds, bonds, equity-linked deposits and notes, high value deposits, stocks, and more. Key features/capabilities of the system include:

- Multi-branch support
- Multi-currency support
- Multi-channel support (e.g. branch offices, Internet /intranet, wireless, call center, IVR)
- Multi-language support
- Multi-product support
- Multi-customer account support
- Rule-based flexibility for charging, pricing and product structure
- Scheduled and ad-hoc reporting support
- Interfaces to external systems
- Comprehensive Security Support

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