ADVISEWEALTH

RM-ASSISTED ADVISORY

Enabling Advisors to grow and deliver accurate client service, with better customer insights and engagement tools.

Product/Strategy screening

Browse investment strategies based on sector, regional and currency preferences

Deeper Analytics

Visual dashboards and insights into client's portfolio

Manage portfolios

Compare and switch to house model portfolio

Detailed profiling

Capture client interests across region, asset, currency, sector, strategy & risk baskets

Straight through Processing

Quick preview, decision making process and execution capability in a seamless journey

Execution & Advisory Capability

Multiple Product Journeys for existing clients and prospects on a single platform to ensure you cover all bases

Why AdviseWealth?

Higher Efficiency & Increased Sales

Service more clients with ready-to-use analytics and portfolio recommendations

Increased engagement with clients

Data-driven product recommendations and initiatives

ADVISEWEALTH

RM-ASSISTED ADVISORY

for Banks, Brokerage Firms, Insurance Companies, Asset Management Companies

Case study with a Top 3 Bank in Thailand

Bank's Challenges

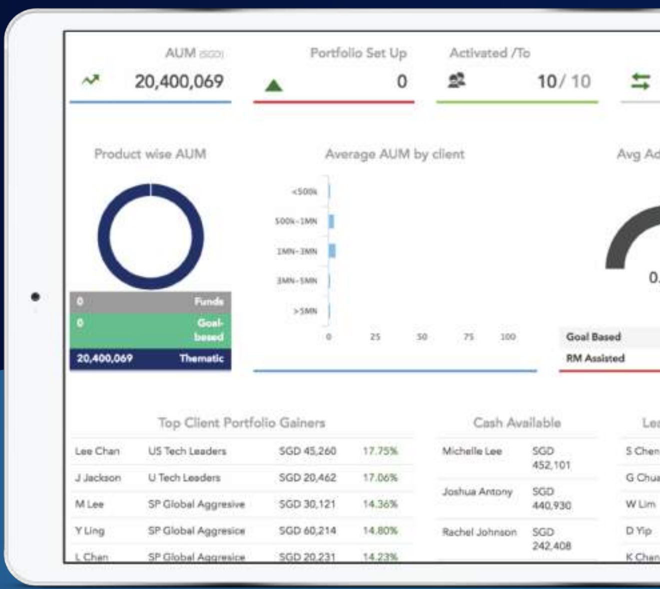
- 1000+ RM team with widely varying sales process
- Manual time consuming processes
- Limited revenue opportunity with transactional business

WeInvest's Solution

- Advisory Portfolio solutions with Goal Based Advisory process
- Faster turnaround with Straight-through-execution processes

Implementation Technology

- Agile/Iterative Methodology
- Business process re-engineering
- Live in 4 months



WEINVEST

WeInvest is a trusted partner in digital wealth services - enabling financial institutions to service their clients better with innovative digital offerings.

www.weinvest.net

Email: **sales@weinvest.net**