

A person wearing glasses is looking at a smartphone. The background is a blurred office environment with a computer monitor and papers.

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Digital Transformation Practice

Tonic Wealth Management Case Studies

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The Client

Global Capital PLC (GC) is a financial services company registered in Malta deriving its core business from the provision of life and health insurance products. The group is also active across the fund and investment markets, offering tailor-made solutions to specific, niche market.

The Problem

Global Capital needed a comprehensive software that consolidate, streamline and automate all aspects of their wealth management business.

The Solution

At Global Capital, Tonic Wealth Management:

- Automated Wealth management workflows, introducing efficient and consolidated business oversight.
- Minimized administration across the organization to raise productivity and customer facing activities.
- Consolidated business metrics in a customizable Business Intelligence dashboard.
- Implemented efficient end-to-end client onboarding workflow and regulatory compliance.



Michael Grech Financial Services

www.michaelgrechfinancial.com

The Client

Michael Grech Financial Services (MGFS) was established and licensed by the Malta Financial Services Authority in 1994 and has since then provided personalized quality financial services to investors in Malta.

The Problem

MGFS needed a customized Asset & Wealth Management portal.

The Solution

With Tonic Wealth Management, MGFS is now benefiting from retaining its clients and increasing its operational efficiency via the use of an online client onboarding, ongoing KYC monitoring, online portfolio management, security income distribution, MiFID reporting and client valuations.

