WDX® WEALTH DYNAMIX

Wealth Dynamix is a global multi-award winning financial technology provider; recognized as the 5th fastest growing Fintech in Europe by the Financial Times in 2018. Underpinned by deep domain expertise we specialize in the provision of a cutting edge Client Lifecycle Management solution for leading private banks and wealth managers globally.

DELIVERING VALUE BY ADDRESSING INDUSTRY CHALLENGES

GROW AUM & MAINTAIN SUSTAINABLE GROWTH

DELIVER EXCELLENT SERVICE TO NEW AND EXISITING CLIENTS

EMBRACE TECHNOLOGY ADVANCES

SOLVE REGULATORY CHALLENGES

THE CLIENT LIFECYCLE MANAGEMENT SOLUTION

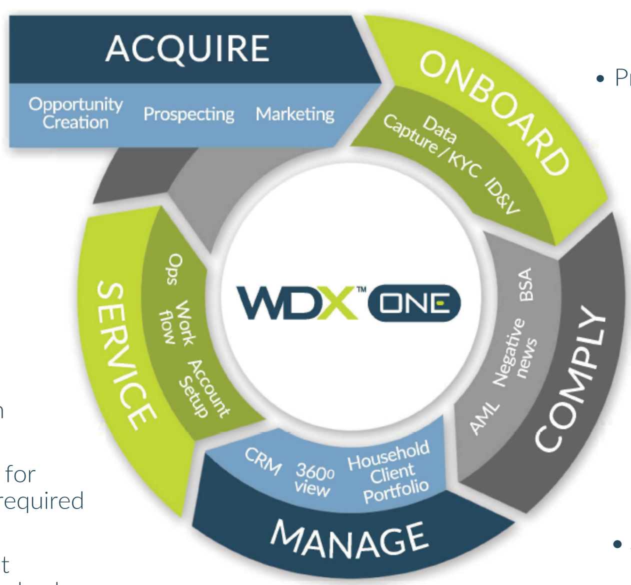
Over the past six years, Wealth Dynamix has developed the platform by leveraging our extensive industry expertise and experience to address and solve the challenges and demands of today's Wealth Managers

Improve Client Acquisition

- Fully integrated marketing and communication tools to discover, target, connect and manage potential client opportunities.
- Increase the probability of winning new business and gaining wallet share.
- Seamless transfer of information from prospecting to onboarding.

Optimize Client Servicing

- Enable any individual in the firm to engage and service every client with the same set of unified data.
- Provide a guided self-serve process for clients and advisors to capture the required evidence for service requests.
- Increase operational efficiency whilst reducing costs with a unified front to back office approach.



Streamline Digital Onboarding

- A streamlined paperless end-to-end onboarding tool for any type of client.
- Pre-configured industry focused workflows to ensure consistency and efficiency.
- Provide the organization, advisors and clients with an integrated self-serve KYC onboarding portal.
- A responsive design adapts to any device to provide a tailored experience.

Stay Compliant

- Integrated regulatory workflows for auditability.
- Continuously monitor ongoing assessments and suitability of advice.
- Streamline regulatory task monitoring and Risk Profiling integration.
- GDPR compliant consent and data privacy management.

Manage Complex Relationships

- Robust client data model which supports all relationship types.
- Empower advisors to proactively manage clients with intuitive 360^{o} dashboards.
- Industry aligned dynamic relationship management tools centralize all client relationships, products, communications and activities into one single view.

GAIN ACTIONABLE BUSINESS INTELLIGENCE

USING POWERFUL ANALYTICS TOOLS ACROSS THE ENTIRE ECOSYSTEM

DELIVERING VALUE TO WEALTH MANAGERS

ADVISOR PRODUCTIVITY
50%
Increase in **time saved** preparing for client meetings

PROCESS EFFICIENCY
SAME DAY
Onboarding for private clients, 25 times faster than the average

CLIENT EXPERIENCE
80%
Increase in **time saved** managing client service requests

USER ADOPTION
100%
Project success rate, defined by user adoption

Our goal is to drive long-term **client satisfaction,** create future **business opportunities** and empower wealth managers by **streamlining** the end-to-end client journey

Why customers use WDX ONE?

- Single, integrated 360° client view
- Complex relationship management including trusts and corporates
- Paperless and streamlined end-to-end client onboarding
- Increase operational efficiency and reduce costs
- Manage regulatory obligations and due diligence
- Target wallet share and grow AUM

Who benefits from WDX ONE?

WEALTH DYNAMIX WORLDWIDE LOCATIONS

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WDX™ CLIENT LIFECYCLE MANAGEMENT SOLUTIONS FOR WEALTH MANAGERS

www.wealth-dynamix.com