

THE CLIENT LIFECYCLE MANAGEMENT SOLUTION

Client Lifecycle Management addresses the complex challenges of relationship management and enables strategies and workflows to help grow your business and serve your clients better.

We simplify the process of client lifecycle management, giving you back precious time, so you can get on with what you are good at.

WDX1 comprises of 3 core modules that work great on their own and even better together

WDX | ENGAGE

Underpin your new business strategy with our innovative solutions to increase prospect conversion, stimulate existing clients and engage your advisors.

WDX | MANAGE

Manage complex relationships with intuitive 360° dashboards to centralize client relationships, products, communications and activities.



WDX | ONBOARD

Ensure compliance and streamline your onboarding processes through automation and digitization.

DELIVERING REAL CHANGE

We have aligned our solution to enable wealth managers to address key industry challenges.

Grow AUM and maintain sustainable growth

Enable advisors to better manage a growing client base while enhancing the client experience using fewer resources.

Deliver excellent service to new and existing clients

Deliver improved client service by streamlining complex workflows as well as providing a self-serve client portal to enhance the onboarding experience.

Embrace technology advances

Empower staff with an agile best in class open architecture toolset to manage all relationship activity via a single, modern, 360° client view.

Solve regulatory challenges

Stay compliant and reduce risk by guiding, tracking and monitoring end-to-end client journeys through KYC, AML risk profiling and suitability reviews.

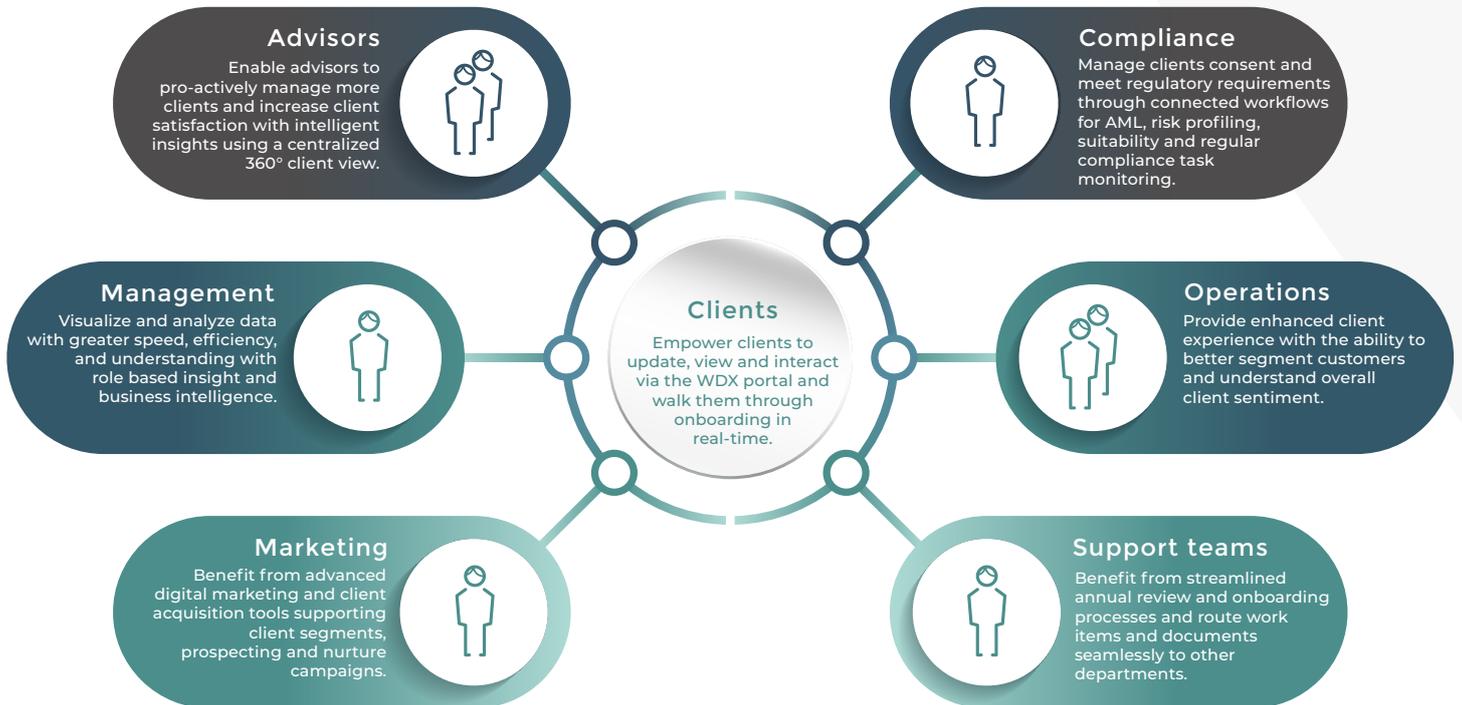


WHY WDX1?

- 🕒 Explore an integrated 360° client view
- 🕒 Increase operational efficiency and reduce costs
- 🕒 Streamline regulatory obligations and due diligence
- 🕒 Target increased share of wallet and grow AUM
- 🕒 Manage complex relationships including trusts and corporates
- 🕒 Onboard clients with an end-to-end paperless and efficient workflow
- 🕒 Offer more tailored client solutions and unlock new revenue opportunities



DELIVERING VALUE ACROSS THE FIRM



OUR OFFICES

● **EMEA**
HQ: London, UK
Zurich, Switzerland
Geneva, Switzerland
Vilnius, Lithuania

● **APAC**
Singapore

● **North America**
New York, USA

