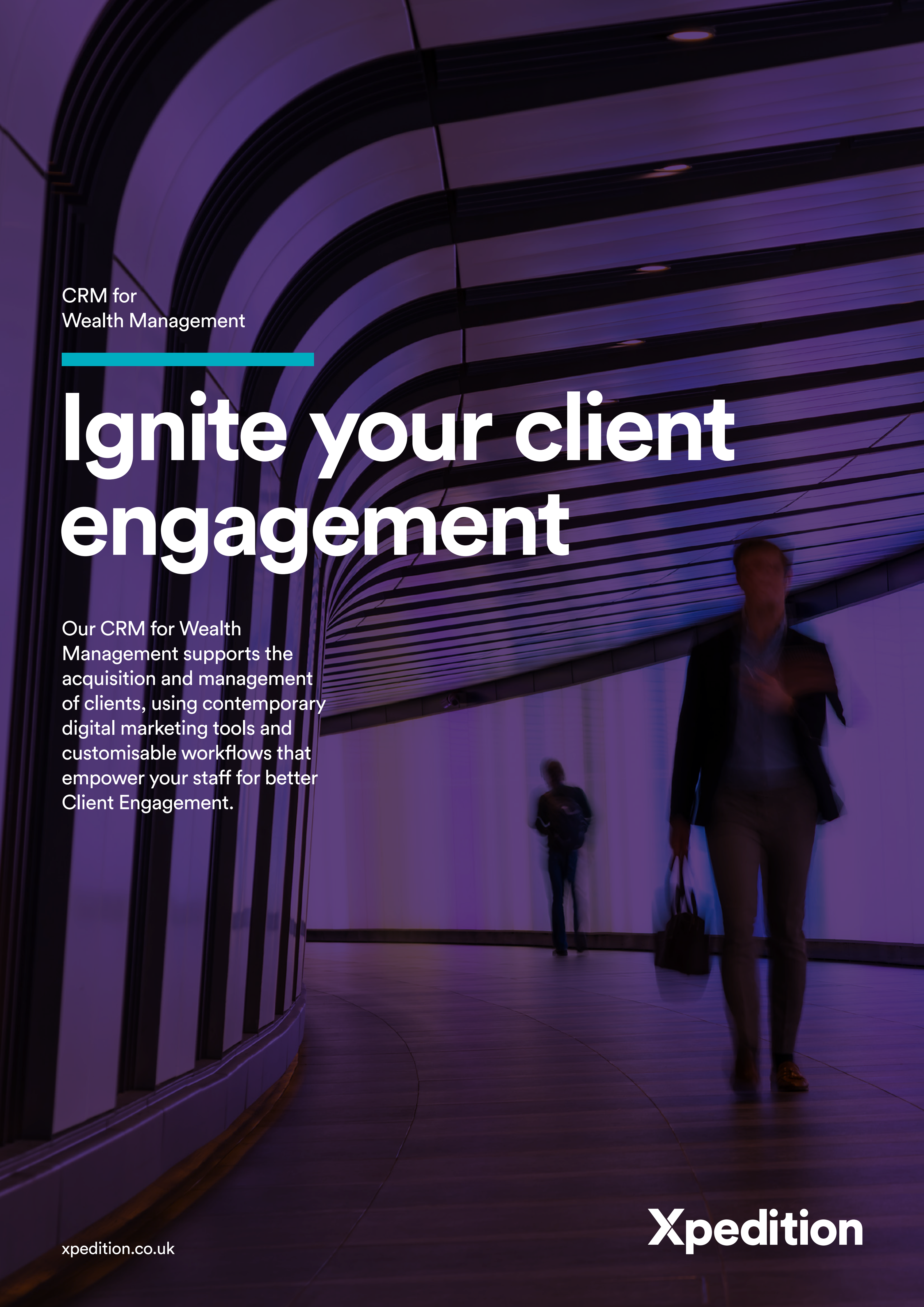

CRM for
Wealth Management

Ignite your client engagement

Our CRM for Wealth Management supports the acquisition and management of clients, using contemporary digital marketing tools and customisable workflows that empower your staff for better Client Engagement.

xpedition.co.uk

Xpedition

6 ways our Wealth Management solution can improve your firm

1. Identify and win prospective clients
2. Streamlined digital onboarding of clients
3. Introduce intermediary and introducer programmes
4. Advanced client data management for enhanced insight
5. Uncover and respond to trends with advanced analytics
6. Support, manage and strengthen client relationships

Are you going above and beyond?

Our solution, which combines software and consultancy, can empower you to do just that.

We understand your industry and we understand that an off-the-shelf solution simply won't do. To make your client engagement stand out you need an industry solution built with you – and your clients – in mind.

From initial contact to the day-to-day conversations and interactions with your clients, you need a CRM solution that is as unique, flexible and as client-focused as you are.

Ignite your client engagement and empower every element of your client relationship with our CRM solution for Wealth Management. As the industry experts in the Wealth Management sector, this CRM solution is tailored to your industry – and your business.

We start with the results you want to achieve. And then, working from the outside in, we streamline your processes and refresh your client experiences to uncover valuable insights and help you build relationships that deliver increased share of wallet and higher client retention.

We make your business flow.

> "..firms must go beyond standard offerings, exploring anything from simulations to applications that link investors to their advisors. These promote increased education, collection of investor data, and insights on Clients' investing habits."
>
> Accenture 2015 – Expectations of Wealth Management: Generation D

Marketing execution

Your very own in-house Marketer, Xpedition solution aids you with:

- Building nurture programs
- Capturing and identifying new prospects
- Social discovery from a variety of social networks including LinkedIn and Twitter
- Viewing web activity of anonymous and identified visitors on your website
- Event management
- Profiling

Business Development

Business development is essential for growth, and this solution assists you with:

- Personalised communications
- Enquiry to account opening
- Opportunity management and pipeline reporting
- Cross-selling
- Document management
- Intermediary relationship management
- Mobile and Tablet Access

Management

Need a solution to systemise and automate your day-to-day?

- Online – self service portal for immediate visibility and knowledge base
- Help meet GDPR obligations
- Client centric wealth management data repository
- Contact and activity management including integration with Outlook Exchange and Office365
- Client on-boarding workflows
- Dashboards and reporting
- Integration with portfolio management, trading and client reporting applications
- Complaints management
- Demonstrate integrity with effective KYC and AML applications

Our proven methodology explores, questions and challenges your existing operational processes in order to deliver a transformational solution.

Key solution features

- Contact and activity management
- Integration with Outlook Exchange
- Client centric wealth management data repository
- Document management
- Referral tracking
- Opportunity management
- Marketing automation
- Campaign and events management
- Company and intermediary management
- Risk profiling and client on-boarding workflows
- Ongoing client suitability review and assessment
- Interactive charts, dashboards and reporting
- Business intelligence reporting
- Tablet and smartphone access

What we bring to the table

Combining software and consultancy, we equip you with the perfect solution to meet your business needs; something we have come to understand in our experience within the wealth management industry.

Dedicated to meticulous project planning, excellent customer service and communication with our customers, our goal is to provide leading edge technology on a proven platform that is delivered via the cloud or existing in-house platforms.

Our solution is built using Microsoft Dynamics; the very best technology in a user-friendly, client focused and – perhaps most importantly for you – low risk package that is easily integrated into your Microsoft environment-on-premise or in the cloud.

At Xpedition, we put you and your clients first. We're dedicated to helping you protect and grow your business by delivering a client experience that earns loyalty, empowers employees and focuses on engagement and communication.

We help ignite your client engagement.

It's what we do.

We deliver real business value at low risk – on time, within budget, and in line with your goals

At Xpedition we guide your path to growth, through the implementation of intelligent cloud-based business applications. We help our clients to understand how technology can empower their business in real terms, and we deliver.

Previously known as TouchstoneCRM, we offer so much more than CRM and business software. We deliver real business value through expert consultancy. We're known for our questioning nature and for challenging the status quo.

We succeed when you succeed, inspiring clients with insight led guidance. Our market leading expertise and industry knowledge will help your business to reach its goals.

We understand your industry. Our experts are passionate about sharing their knowledge, revitalising client experiences and improving operational efficiency. At Xpedition, we'll show you the way.

To learn more about Xpedition, visit:
www.xpedition.co.uk

Or contact us on
020 7121 4705
info@xpedition.co.uk

Xpedition
46 Worship Street
London
EC2A 2EA

Xpedition