

PFTP Pro Enterprise Wealth Management Suite



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Wealth Management – front office innovation



Challenge

Shrinking margins
How do you increase profitability while the regulatory landscape is shifting, competition increasing and clients demand ever more sophisticated, innovative services for less?

- Competition from new, low-cost entrants
- Clients expect added value across channels
- Increased investor protection and other MiFID II obligations such as cost transparency are a threat to business-as-usual



Ideal Solution

Create value for clients while lowering costs
Delivering sophisticated, personalized, compliant and ongoing services across the client's preferred channels, exploiting all possible opportunities for automation

- Prove the value of services to clients
- Differentiate from competitors where it matters most: The Front Office
- Improve relationship manager efficiency
- Ensure compliance



Desired Outcomes

An efficient, compliant front office delivering the services that investors want across multiple channels
Provide relationship managers and end-investors with the tools they need to manage wealth more effectively at a lower cost-to-serve

- Retain and win new clients with personalized, value adding services
- Lower cost-to-serve through automation
- Govern the distribution network
- Minimize risks of non-compliance



PFTPro Enterprise Wealth Management Suite



PFTPro front office tools deliver enhanced, compliant investment services and reduce cost-to-serve

Innovative

Innovation is at the core of what we do

- Differentiate with cutting edge, omni-channel services
- Lower the cost-to-serve with state-of-the-art automation
- Reconcile regulatory constraints with commercial needs

Experienced

40+ years of experience serving financial institutions

- Development of innovative service models, methodologies, analytics and software
- Overall, PFTPro supports over €2 trillion of AUM across 80,000 RMs and 50 million portfolios

Bespoke

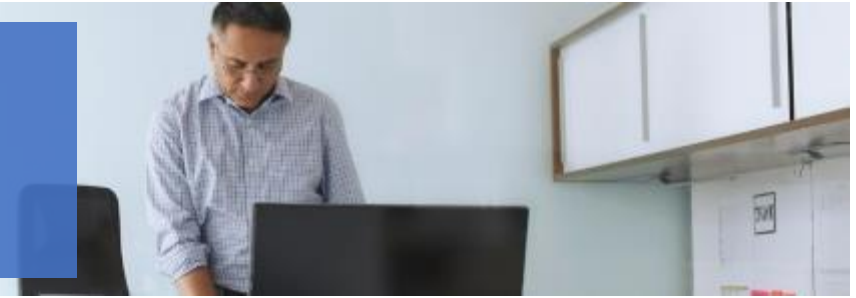
Adapt our solutions to your business

- PFTPro is fully modular and customizable to your unique front office processes
- In partnership with Azure, scales to serve the biggest wealth managers

PFTPro is the leading wealth management solution in the European market, as confirmed by XCelent Technology and XCelent Customer Base awards in Celent's latest front office vendor evaluation



PFTPro with Microsoft Azure



Rapid, scalable deployment of wealth management front office tools to better serve your clients and reduce cost-to-serve

Solution Alignment

Scalability

Capacity to serve tens of thousands of relationship managers efficiently and process tens of millions of portfolios on a single installation.

Activation of infrastructural resources on-demand leads to reduced costs.



Speed

Improved time-to-market by leveraging PFTPro's native integration into the Azure infrastructure

Improved performance, particularly in periodic resource intensive applications, such as batch calculations



Simplicity

Running PFTPro on Azure minimizes on-premise integration; no more worries about infrastructure provision, monitoring, availability, continuity and associated costs and issues

