



# Wealth Management Simplified

Stay Competitive by becoming Certain, Cost-effective,  
Customer-centric and Compliant

*The pace of business transformation is speeding up. The inevitability of change, depth of digital impact, regulatory challenges and increasing client's expectations are also rapidly transforming wealth management industry.*

Chris Gogol, founder of WealthArc

Our easy to implement  
technology gives wealth  
management professionals  
a competitive edge by being:



## CERTAIN

Consolidates Data from multiple sources saving you time, hassle and money



## COST-EFFECTIVE

Optimizes Manual Workflows for maximum productivity allowing you to focus on what matters, whether that's chasing a new clients or servicing the ones you already have



## CUSTOMER-CENTRIC

Attracts and satisfies even the most tech-savvy customers, thanks to an intuitive, white-labeled Digital Client Interface



## COMPLIANT

Automates Regulatory Compliance protecting your business from potential penalties and freeing your mind from the hassle of tedious administrative tasks



# Start your transformation today!

## Book a demo!

Sign up for our 3-month pilot by 18th of December  
and get 50% off the regular price.


 [wealtharc.com/schedule](https://wealtharc.com/schedule)

### Key benefits include:

- ✓ 35+ custodian connections
- ✓ 48-hour activation
- ✓ Fast and intuitive interface
- ✓ Customized APIs providing the best quality data
- ✓ No setup costs
- ✓ Unlimited users - access for your entire team
- ✓ A 3-month pilot with real client portfolios
- ✓ Flexible pricing based on modules you need and use
- ✓ No hidden costs - pricing covers IT and Server Hosting, market data, APIs, unlimited portfolios, transactions and user logins
- ✓ White-labeled reports

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