



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

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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