

Capgemini 

GOLD FOR WEALTH MANAGEMENT

AI-DRIVEN WEALTH MANAGEMENT PLATFORM FOR HIGH-TOUCH EXPERIENCES AT SCALE



CAPGEMINI CAPABILITY AND PARTNERSHIP WITH MICROSOFT

THE PEOPLE



16000+
Microsoft Cloud
Certified Consultants



7000+
Azure
Certified Architects



1100+
O365/SharePoint
Consultants



750+
Power Platform
Consultants



500+
MS Dynamics
CRM specialists



400+
Power BI Consultants



THE PARTNERSHIP

27+ Years as a Microsoft Partner

Combining our FSI Domain and Technology expertise with Microsoft Technology expertise to drive sustainable digital transformation globally with significant YoY growth in Partner influenced ACR



THE RECOGNITION Microsoft Awards

- 2023 Microsoft US Partner of the Year – FSI
- 2023 SAP on Azure and GSI Growth Partner of the Year Awards
- 2022 Country Partner of the Year – Germany
- 2022 Microsoft Partner of the Year - Power Platform
- 2022 Finalist – SAP on Azure
- 2022 Microsoft Power Platform Partner of the Year
- 2021 Partner of the Year, GSI Digital Transformation
- 2021 Partner of the Year, Financial Services
- 2021 Partner of the Year, Analytics
- 2021 Partner of the Year, Spain
- 2021 Partner of the Year, Netherlands (Sogeti)
- 2021 Microsoft Academy-Business Applications, Italy
- 2021 Microsoft Sustainability Award, France
- Microsoft Advanced Specialization for Low Code Application Development
- Microsoft Cloud for Financial Services Launch Partner

AZURE MARKETPLACE

Select Financial Services offerings co-created with Microsoft

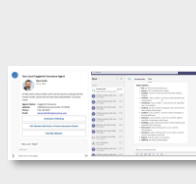
Azure Landing Zone & Cloud Automation Platform



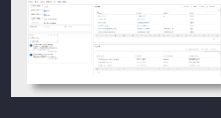
Mainframe Modernization with Azure



Cyber Defense Services with Sentinel



Payments Transformation with SWIFT



Power Platform & D365 Industry Cloud Solutions



Connected Employee Experience (Viva)

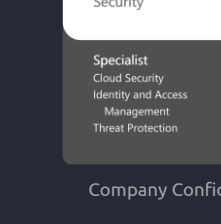
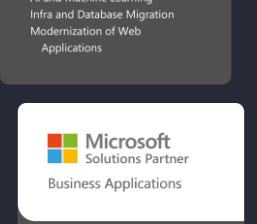
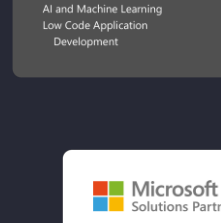
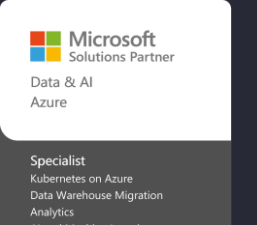
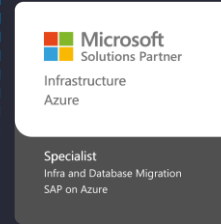


Digital Marketing & Hyper Personalization



SOLUTION PARTNER

Credentials validated by Microsoft





What Affluent Clients and Advisors Expect from Wealth Management Platforms

Affluent customer expectations

Life Event Recognition with Personalized Recommendations

Timely identification of significant life events and provision of tailored investment and financial advice.

24/7 Access to Information and Advice

Continuous, round-the-clock access to pertinent financial information and expert guidance.

Concierge-Like Experience

High-touch, personalized service experience catering to unique and evolving client needs.

Advisor asks

Enhanced Intelligence on Life Events

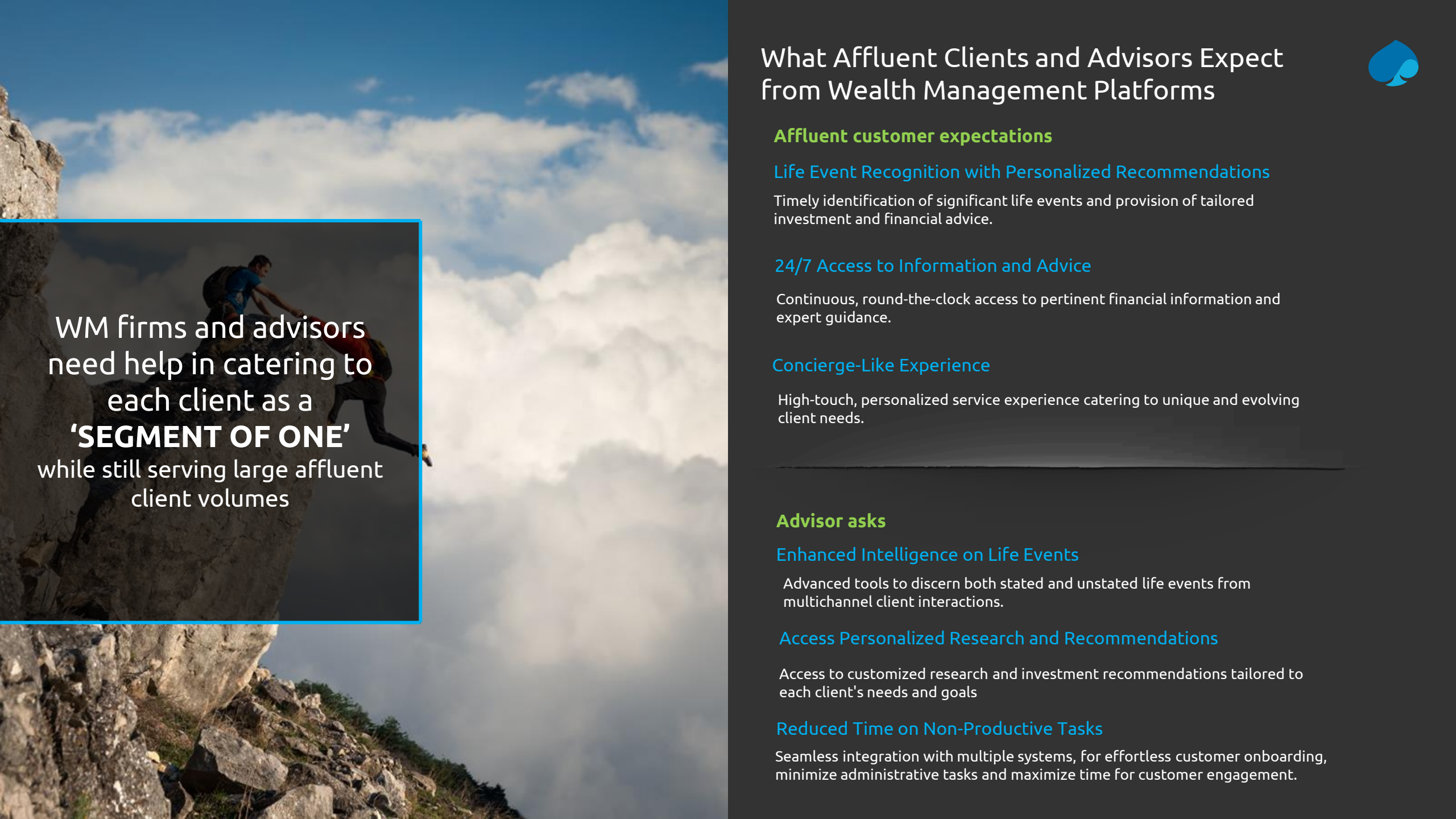
Advanced tools to discern both stated and unstated life events from multichannel client interactions.

Access Personalized Research and Recommendations

Access to customized research and investment recommendations tailored to each client's needs and goals

Reduced Time on Non-Productive Tasks

Seamless integration with multiple systems, for effortless customer onboarding, minimize administrative tasks and maximize time for customer engagement.



WM firms and advisors need help in catering to each client as a **'SEGMENT OF ONE'** while still serving large affluent client volumes



The Solution: Introducing Gold Platform Powered by AI

A revolutionary wealth management platform which delivers proactive, personalized advice, leveraging unified customer data for smart portfolio optimization and impactful insights. Empowering advisors to exceed client expectations with strategic intelligence, precision, and efficiency.



FS SBU Generative AI Capabilities



We are thought leaders in Generative AI...



€2 billion investment in AI

33000+ Data & AI Consultants

Dedicated FS Generative AI COE



Declared leader in Gen AI services by analysts



...with a recognized Financial Services-focused track record



300+ Generative AI programs 130+ program delivered...



..supported by our comprehensive solutions portfolio



Generative AI partnerships ecosystem

About Capgemini

Capgemini is a global business and technology transformation partner, helping organizations to accelerate their dual transition to a digital and sustainable world, while creating tangible impact for enterprises and society. It is a responsible and diverse group of 340,000 team members in more than 50 countries. With its strong over 55-year heritage, Capgemini is trusted by its clients to unlock the value of technology to address the entire breadth of their business needs. It delivers end-to-end services and solutions leveraging strengths from strategy and design to engineering, all fueled by its market leading capabilities in AI, cloud and data, combined with its deep industry expertise and partner ecosystem. The Group reported 2023 global revenues of €22.5 billion.

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