prodware
Wealth Management

# Run and develop your wealth management portfolio whilst maintaining security and confidentiality

Available on Microsoft AppSource


One of the greatest challenges of the wealth management sector is to identify client potential in order to tailor your activities:

"I need a complete view of my client AUM and I have too many systems running separately to do this easily."

"I need to ensure our processes and data are compliant with business controls in place."

"We need to see partner pipelines in order to set priorities and action plans."

## Why choose Prodware to support your wealth management needs in Microsoft Dynamics 365 for Sales?

As a Microsoft partner, Prodware has developed and implemented Dynamics 365 for Customer Engagement and CRM projects across Europe.

Our experienced R&D team work closely with our financial services clients to develop additional functionalities that suit their own needs.

## Wealth Management is suitable for wealth managers, life insurance experts and private bankers:

- Achieve a holistic view of client potential, categorize profiles and set priorities
- Benefit from 360 degree analytics
- Optimize portfolio management
- Customizable and flexible, it extends the future-proof functionality of Microsoft Dynamics 365
- Connect your multiple back end systems with easy mapping, update scheduling and error processes

### Simplify profile management

Set up profiles to fit your own business goals (e.g. Risk profiles and potential profiles).

### Maintain your client offering and align users

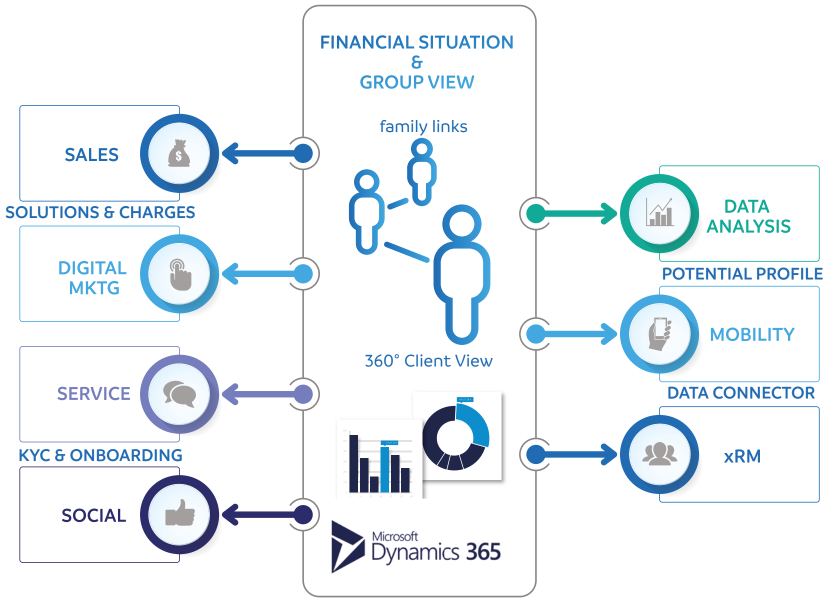
Create your own Solution Catalog with corresponding charges.

### Future proof

Certified for Microsoft AppSource, the solution is available for free trial or online purchasing.

### Flexible and configurable

Set up key areas such as asset types and countries. Use the Data Connector to bring your back end systems into Dynamics 365.

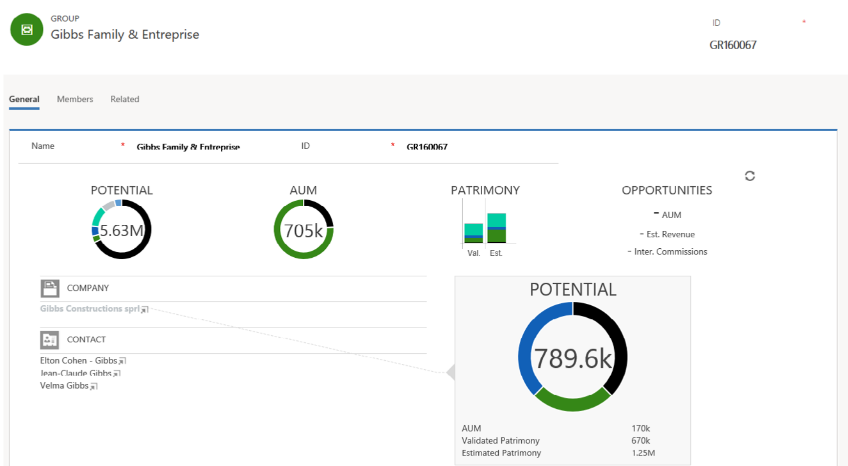



## All you need to run your wealth management operation

- Assets overview (solution catalog, opportunities and Know your Customer information)
- Onboarding process
- Group view (of family members or members of a group)
- Risk profile
- Clients' potential
- Partner commissions and company charges calculations
- Back end data connector for other system feeds
- Advanced insights and analytics

## Easily surface financial situation of members and view potential in the pipeline

The solution brings together all information about each member's net worth and potential, whilst providing graphs that gather essential data such as portfolio spread and revenue generated for your organization.




Speak to Prodware about realizing the potential of your wealth management portfolio with secure and professional tools.

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Contact appsource@prodwaregroup.com to discover more.

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