

# Gary Linieres

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Wealth Dynamix



## Q What have been the biggest achievements for Wealth Dynamix to date?

Wealth Dynamix was borne out of my passion for wealth management and frustration that the client was being poorly served. My mission was to solve a myriad of client management issues with technology, to significantly enrich the client experience rather than focusing on servicing accounts and portfolios. Client success and independent validation are two of our greatest achievements.

Winning our first clients, all prestigious UK wealth management firms, was a notable stake in the ground. For firms like Quilter Cheviot, Ruffer, Brewin, Cazenove, Rothschild and Rathbones to entrust Wealth Dynamix with their Client Lifecycle Management (CLM) was a major coup. Seeing all of their staff using our software was incredible. Our growth rate has also been impressive, now that we are earning the trust of large global banks.

Our award tally is approaching forty, recognising our industry-leading position at the forefront of the global wealth management technology scene. Most recently we made the 'Most influential FinTech Companies to Watch in 2020' list published by Harrington Starr's Financial Technologist, which showcases firms that will have a major impact in the year ahead.

As an entrepreneur, the milestones that I have found personally rewarding include moving from serviced offices into our own stylish premises, exceeding one hundred staff on payroll and growing cash

in the bank from a small amount in the frugal early days to eight-figure revenues and beyond. Our investment in people, both financially and emotionally, has seen many incredibly talented people grow into senior management roles, and in some cases become entrepreneurs themselves.

## Q What key industry challenges does Wealth Dynamix solve?

Wealth managers face three key challenges. There is too much friction and inefficiency throughout the CLM process, compliance remains a major hurdle and digitising the client experience and service is a marathon not a sprint. In 2020 we are seeing the perfect storm. Cost cutting is key to maintaining fees at a competitive level and ensuring profitable cost-income ratios, but client service remains the number one consideration.

Our WDX1 solution takes the pain out of day-to-day client management tasks by automating manual processes and consolidating a multitude of disparate systems and silos of information into one joined-up platform, with a single log in and user interface. It remains a mystery to me why most vendors have invested heavily in developing onboarding solutions, then bolted them onto other systems as an afterthought, leading to inconsistent quality, functionality and customer experience across the client lifecycle. The client experience begins way before onboarding and extends far beyond it. Wealth Dynamix has always viewed CLM holistically, and challenges across the entire

lifecycle are addressed by WDX1 to ensure happy outcomes.

## Q What sets you apart from your competitors?

I take great pride in knowing that no other vendor can offer one unified platform spanning the entire client journey, and therefore able to join up journeys throughout the client lifecycle. Our sole focus on wealth management makes us the top choice for firms wanting to achieve process efficiencies, enrich client service and ensure compliance. Clients come to us because we understand their pain. We have applied deep domain expertise to unleash the power of data across the firm and the ROI from time and cost savings is immense. No other provider can empower wealth managers to service clients efficiently and with insight, whatever their requirements or stage in the client lifecycle, while maintaining a defensible audit trail.

## Q What's next for Wealth Dynamix?

The next twelve months is packed with innovation and initiatives that will support wealth managers in their quest to better serve clients and grow revenues. We are sharpening the saw around our products, enriching our technology platform with actionable AI, cognitive services and remote working and mobile solutions that deliver real value. And as a business we will grow substantially. As well as deepening our roots in home markets we will expand globally into North America, and extend our reach into Asia, which is proving to be a very exciting market for us.