

**10 REASONS TO CHOOSE**  
**WEALTH DYNAMIX**

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**WEALTH  
DYNAMIX**



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## FOREWORD

by Johnny Beloe | Director of Pre-Sales

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**A warm welcome from us all at Wealth Dynamix and thanks for taking the time to review this ebook.**

Are your relationship managers fully equipped to take on the growing digital trends and challenges of the wealth management industry? According to a Northwestern Mutual survey, a notable one-fifth of high net worth (HNW) clients say that they are likely to switch their primary wealth managers in 2021. Coupled with the looming generational wealth transfer (estimated to be valued at approximately US\$68 trillion within 25 years), of which more than 80% of heirs have indicated an inclination to change financial advisors after inheriting their parents' wealth, private banks and wealth managers are facing a potentially large outflow of clients and assets under management (AuM) unless they can position themselves to address the wants, needs and expectations of this new generation. The stakes to create loyal and long-lasting customer relationships have arguably never been higher and, equally, there has rarely been more opportunity to gain market share for those that can get it right. The question is, just how do you 'get it right'?

Customers are demanding a more personal service<sup>1</sup>, at their own convenience<sup>2</sup>, for lower fees<sup>3</sup>; they want to both have their cake and eat it. To 'get it right' is to deliver on this demand whilst avoiding being hamstrung by costs. The promise of a solution, as it so often does, lies in technology; in using technology to help address customer's, wants, needs and expectations without increasing the internal cost base or, better still, using the efficiencies technology can deliver to reduce costs and not just maintain margins, but potentially improve them. The use of a modern CLM system can go a long way toward allowing firms to do this; it is not the only important technology in a Wealth Manager of Private Bank, but it is certainly one that sits at the heart of many key processes - onboarding, customer reviews, ongoing compliance checks and more. And yet, when it comes to new technology, a degree of caution and careful consideration is often advisable; not all CLM systems are created equally and not all firms have the same ability to deliver them<sup>4</sup>. At Wealth Dynamix, we offer market-leading CLM solutions that allows firms to take advantage of the opportunity presented by today's market disruption, and the comfort of a track record of delivery to some of the best known names in Wealth Management and Private Banking. In this e-book, find out more about why Wealth Dynamix and our solutions are the right choice for your business.

1 | Research by Accenture (2017), republished by The Financial Brand tell us that 90% of customers feel a personalised experience is important and that 33% of customers who abandon business relationships do so because personalisation is lacking.

2 | The Power of Personalisation by Digital Banking Report (2018) tell us that 97% of customers feel that the ability to receive advice in real-time or near-real time as part of their service is at least 'somewhat important'. Research by BCG suggests that, even in finance, people are beginning to expect Amazon-type - What Does Personalization in Banking Really Mean (2018), Boston Consulting Group.

3 | Ernst & Young report pricing to be the top consideration for clients, with 95% reporting it to be of value to them. See How do you Build Value when Clients want more than Wealth: Global Wealth Management Research Report (2019), Ernst & Young.

4 | Specifically on technological change, the frequently referenced Standish Group Chaos Report (2015) estimates only 29% of change projects can be considered a complete success, with about 20% classified as a total failure.



## WHY CHOOSE WEALTH DYNAMIX

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Wealth Dynamix provides a multi-award-winning, fully integrated, end-to-end digital CLM solution that addresses the complex requirements of all phases of the client lifecycle (i.e. client acquisition, digital onboarding, regulatory compliance, relationship management, client engagement, and ongoing client servicing).

Launched in 2012 in the UK, Wealth Dynamix has since expanded to more than 6 different locations globally whilst still holding true to its original goals – to provide a superior, frictionless customer experience whilst simultaneously reducing cost by enabling major gains in the internal operational/process efficiency.

Our solution provides a full suite of features that are not limited to the following:

- A 360-degree view of clients and prospects
- End-to-end digital onboarding process
- Generation of deep insights and action triggers for relationship managers
- Fully digitised and efficient client servicing workflows
- Full integration with existing core banking and PMS systems

**As we celebrate 10 years supporting wealth and asset management firms, we lay out how you can win with Wealth Dynamix starting with these 10 reasons.**

**We hope that you find this both a useful and insightful read.**





# REASON 1

## SETTING A SOLID FOUNDATION FOR DIGITAL TRANSFORMATION THROUGH A SINGLE SOURCE OF TRUTH

A strong data foundation is key for any successful organisation, yet many wealth managers struggle with this aspect of the business. In fact, according to a survey done by the WBR Insights research team, only a meagre 25% of financial institutions claim to be able to source and manage data effectively from all their data inputs<sup>5</sup>.

It is no mystery why managing data can be such a formidable task. After all, the wealth management industry is a long-established and sophisticated one, which, in many cases, has resulted in a bulky, complex data environment. Furthermore, this challenge is amplified by the rapidly growing volume of data across the world that is estimated to grow five-fold in 2025<sup>6</sup>.

Historically, the departments of some private banks and wealth managers have taken a siloed approach to data input and maintenance. The technology in place – or sometimes the lack of it – meant that client data couldn't be automatically shared and reused across departments. Naturally, this led to a host of problems, including loss of important information, data-input repetition and human error. It's as frustrating for wealth managers and back-office functions as it is for clients, who may become aware of internal inefficiencies when asked for the same information multiple times or where a human error is externally exposed to the customer.

In Wealth Dynamix, we ensure that we get this crucial foundation block right by having our data come from a single source of truth.

### Single source of truth

Wealth Dynamix pulls all CLM data from one centralised well of information, which is then reused consistently across all processes and shared across different teams. Front, middle, and back offices all have the most up-to-the-minute data without the need for manual intervention. Intelligent controls such as duplication and logic checks are also constantly run against new inputs to ensure their integrity.

With our solution, data quality improves, and data management becomes less cumbersome. Inconsistent data between the frontline and back-end is eliminated, which opens the door to more effective connectivity and client-centric collaboration. Furthermore, with the ability to reuse existing information intelligently, time spent on manual work and data hunting is cut down significantly. This time saving can be significant, given that the average information worker spends as much as 36% of their week searching for data, and more than 40% of those searches are fruitless<sup>7</sup>.

**Wealth Dynamix pulls all CLM data from one centralised well of information, which is then reused consistently across all processes and shared across different teams.**

5 | Data Management Challenges in The Investment and Asset Management Sector

6 | Banks Need to Buckle Up for These Big Data Trends (thefinancialbrand.com)

7 | How much time are you wasting on siloed information 2018





# REASON 2

## IMPROVED CLIENT SERVICE VIA A DEEPER UNDERSTANDING

A typical wealth manager will service a multitude of clients from different demographics with differing goals, financial needs, interests and attitudes to risk and ESG, to name but a few examples.

To remain competitive in today's world, wealth managers need to be able to provide a service that acknowledges these variables and provides the sorts of personalisation the new generation of wealth management is looking for<sup>8</sup>. In the past, perhaps, this could have been achieved through exceptionally high-touch, personalised relationships; a traditional relationship where the client and their manager meet regularly in person and speak more frequently on the phone. Yet, in an environment where the margins of wealth managers and private banks are increasingly slim, firms need to adapt their approach to providing true personalisation to a potentially growing customer base without major cost overhead.

From a single solution that is by the client's side from the start to the end of the client journey to our comprehensive 360-degree view of each client and prospect, Wealth Dynamix boosts the wealth manager's ability to understand their clients deeply to ensure that interactions and services are personalised to every client. And, crucially, it does this largely automatically, delivering true insight and understanding without the cost overhead.

### Collecting clients' preferences and data across all points of the client journey

At Wealth Dynamix, we are with you right from the first touch point with a prospect through to the onboarding process, ongoing management, and servicing of the customer. All interactions and data points of the clients are captured across the entire client journey, providing firms with a comprehensive mass of data on the client.

This enables firms to work with a greater degree of information in comparison to some other CRM solutions. Powered by cognitive services and powerful analytics to separate the signals from the noise, our solution converts vast quantities of data into valuable insights for relationship managers to understand their clients and prospects in ways not previously possible.

### Staying relevant to prospects'/clients' needs with a 360-degree view at our fingertips

Today, just 14% of organisations have captured a full 360-degree view of their clients, whilst, perhaps surprisingly, in 2022, the majority - 82% - are still only in the planning stages<sup>9</sup>. With our solution, all relationship managers will be equipped with a 360-degree view of both clients and prospects.

The power of 360-degree data goes beyond just helping the relationship manager gather required information on their clients. Using real-time information and intelligent data-visualisation tools, wealth managers can easily analyse client sentiments, gain insights into client behavioural trends, and recommend relevant products to each specific client's needs. With this level of detail at their fingertips, wealth managers can easily stay hyper-relevant and constantly deliver value - building greater client satisfaction and increasing prospect win rates.

To remain competitive in today's world, wealth managers need to be able to provide a service that acknowledges these variables and provides the sorts of personalisation the new generation of wealth management is looking for.





# REASON 3

## MORE EFFICIENT COLLABORATIVE WAYS OF WORKING

As the mantra goes, “teamwork makes the dream work”. However, many private banks struggle to make this a reality with teams working in fragmented systems entirely, or complexities in ensuring proper entitlement controls within the same systems. In fact, 35% of wealth management organisations claim to struggle to properly control entitlements and permissions<sup>10</sup>, which potentially puts them at security and audit risk.

Wealth Dynamix provides you with a truly effective digital platform that does away with traditional siloed thinking and paves the way for deeper collaboration across departments. With zero hassle, you can effortlessly collaborate with different roles on complex tasks and processes, leveraging a single, common set of shared data.

### A secured, digital working experience for all roles

Wealth Dynamix understands that to fully digitise a client’s lifecycle journey, we must go beyond just the role of the relationship manager – which is why our solution provides a use for any role in the firm. Whether it be front office bankers, service assistants, operations, compliance, marketing, management or more, Wealth Dynamix can tailor your dashboards and features to the user’s needs and seniority, with configurable role-based dashboards showing the user notifications, insights, and analytics relevant directly to them. Permissions and entitlements are also tightly controlled according to your internal policies.

When all the teams are on a single platform and share the same data set, collaborations become seamless and processes more efficient. Workflow-driven call-to-actions are automatically issued to their relevant parties without any manual work, and tasks can also be easily assigned to responsible users with a single click of a button. For example, a client might request a change in domicile, which requires evidence sighting and approval from the compliance team. Without the need to print forms or even reattach the same document proof in emails, the compliance team can easily be notified of this open case, view the required evidence, and provide the necessary approvals, all within the Wealth Dynamix solution. The progress of all these workflows and items can also be easily monitored by the relationship manager.

Furthermore, rest assured that the solution will safeguard sensitive client data to be viewed, edited, copied, or downloaded only by authorised users. With 82% of data breaches found to be caused by mishandling of information<sup>11</sup>, this assurance of security can reduce the risk of litigation or a damaged reputation arising from data leaks.

### Seamless navigation to other systems

Whilst Wealth Dynamix’s CLM solutions serve as the hub that sits at customer-centric activity, it is inevitable that certain processes and business functions will require access to other specialist systems, such as a PMS or core-banking system. Wealth Dynamix recognises the need to connect these systems with the CLM, not only at a data integration level, but also when it comes to user experience. Wealth Dynamix’s contextual navigation solutions provide the ability to navigate seamlessly from the CLM solution directly to the relevant screens of other technology solutions and vice versa so that users do not have to go through the hassle of toggling between multiple screens.

Wealth Dynamix can tailor your dashboards and features to the user’s needs and seniority, with configurable role-based dashboards showing the user notifications, insights, and analytics relevant directly to them.





# REASON 4

## IMPROVED, INTEGRATED COMPLIANCE

In 2020, the number of regulatory events and organisations tracked for regulatory events grew by more than 4.5 times in ten years<sup>12</sup>. With regulations changing at a rapid pace and becoming increasingly complex, it is no surprise that wealth management firms are investing more time and resources into keeping up with the regulations. According to a survey by Duff & Phelps, financial professionals expect their spending on compliance to double over the next five years<sup>13</sup>.

Wealth Dynamix eases this growing burden for wealth managers by strengthening their capabilities to meet internal policies and compliance obligations in their processes. Automated, rule-based triggers and interconnected workflows ensure that processes are complete and compliant, with the proper checks made at the right time.

### Control and visibility

In the ever-changing environment where regulatory costs and effort are only expected to increase in the coming years, it is crucial for wealth managers to manage and focus their compliance overheads effectively. With our sophisticated dynamic workflow engine, Wealth Dynamix can effectively bake the nuances of your internal policies and interpretation of regulations into your processes and workflows, which reduces human error and missed checks. Furthermore, using rule-based logic to intelligently identify and pass 'happy-path' cases while alerting for exceptional cases, Wealth Dynamix can reduce the manual effort of the compliance team for each task, with their involvement required only in response to triggered exceptions rather than manually completing the same, time-consuming tasks for every case. This can be applied across all processes of the firm, from the complex onboarding process to scheduled or ad-hoc reviews of clients' statuses such as suitability, source of wealth, or risk profile.

Aside from the time and effort saved on monotonous tasks, the compliance team are also aided with a dashboard that can enable them to monitor the overall compliance health of the firm (e.g. number of onboarding cases disqualified, number of outstanding reviews). The compliance team will also be able to easily monitor relationship managers and their client interactions and spot exceptional patterns of clients' behaviour. With these insights at their fingertips and without being overburdened by repetitive tasks, the compliance officer can now focus more on strategic and value-adding activities.

### An audit you can rely on

Wealth Dynamix can also make one of the most dreaded compliance processes more painless - audit. With all data logs tracked and stored within the system, this makes collecting the necessary information and generating reports for audit much quicker and easier. This is extremely relevant in the present day, and in the future, there is an expected increase in involvement and information requests from regulators on financial institutions<sup>14</sup>.

Automated, rule-based triggers and interconnected workflows ensure that processes are complete and compliant, with the proper checks made at the right time.



12 | Shaping the future (thomsonreuters.com)

13 | Compliance and Regulatory Update 2022

14 | Shaping the future (thomsonreuters.com)



# REASON 5

## SAME DAY ONBOARDING

With multiple documents to be signed, information to be sighted, and various AML/KYC checks to be conducted, the client's onboarding process can be an arduous task for all wealth managers. According to a survey done by Hubbis, 45% of wealth managers find the onboarding process to be the most challenging out of the entire compliance ecosystem<sup>15</sup>.

However, at the same time, it is also crucial to ensure that this process is pleasing to the client, as you will never get a second chance at a first impression. For many clients, the onboarding process will be their first and most enduring experience with their wealth manager. Studies show that 68% of clients lose faith and abandon the process altogether due to it being too cumbersome<sup>16</sup>.

The Wealth Dynamix solution effectively tackles this challenge and transforms the onboarding process into a smooth and effortless one for both internal staff and clients.

### Same Day Onboarding

With the use of intelligent processes such as parallel processing and dynamic interfaces, the Wealth Dynamix solution can significantly reduce the time and resources taken to onboard a client. Whether it be a structurally intricate corporate account, or maybe an individual with particularly complex personal circumstances requiring greater due diligence, Wealth Dynamix makes the onboarding process efficient, consistent and trouble-free. With logic-defined document checklists, dynamic forms, and automated document generation and distribution of documents to the correct parties within the relationship, wealth managers can get it right when reaching out to their onboarding clients for the first time – a vast improvement to most existing processes given that an average of 49% of submissions require a revisit by relationship managers to the client due to insufficient documentation to meet the onboarding requirements<sup>17</sup>. The ability to pre-populate forms on our system also significantly reduces the risk of human error and frustration from clients asked to sign various documents again. Combined with seamless integration with AML due diligence screens and a frictionless flow to compliance and approvers, both front-facing and internal processes of the onboarding journey are wholistically transformed into a much more efficient one.

Our users have found a significant reduction in the time taken to onboard a client – taking as little as a single day to onboard a client with our solution – a far superior turnaround time to the industry average of 14 days<sup>18</sup>.

### Ability to support client portal

Aside from streamlining and digitising the internal processes of this onerous process, Wealth Dynamix goes further to make it a pleasing experience with the support of an omnichannel client portal option in parallel. With clients growing more inclined towards self-service and 51% of HNWIs and wealth managers not satisfied with traditional wealth manager/client communication channel choices<sup>19</sup>, Wealth Dynamix can provide a client portal that allows the client to feel in the driving seat. This client-facing digital experience makes it convenient for clients to upload and sign forms back to the firm while working in perfect harmony with the internal process. Instead of having

to resort to existing methods of reattaching files in emails or - still for some firms - using the fax machine or post, clients can submit evidence of their identity or source of wealth via the client portal digitally with a snap of a picture on their smartphone. This convenience for the client reduces the waiting time for the firm to receive the required documents, allowing onboarding to be completed swiftly and relationship managers to start revenue-generating activities with their clients.

**Studies show that 68% of clients lose faith and abandon the process altogether due to it being too cumbersome.**

15 | Compliance and Regulatory Update 2022

16 | The battle to onboard 2022

17 | Next level client onboarding

18 | Next level client onboarding

19 | Top Trends in Wealth Management 2022





# REASON 6

## IMPROVED CLIENT EXPERIENCE AND SENTIMENT

### Elevate client experiences with accelerated and quality client service responses

Keep clients and potential clients feeling valued by managing their requests and queries effectively with our leading CLM technology. Wealth managers face numerous requests from their clients on a day-to-day basis. Whether a comparatively simple process, such as a change of address, or a more complex process, such as complaints handling or an event-driven triggered review, all ongoing servicing activities should reflect best practice policy and SLAs together with any related regulatory obligations.

The complexity of these processes and the associated obligations can result in sub-optimal client experience when the appropriate systematic support for these processes is not in place; missed SLAs, externally exposed manual errors, or poor communication on progression are just three examples of clients' disgruntlement with the ongoing customer service sometimes received in the wealth management industry.

With Wealth Dynamix, we can alleviate this process by providing a seamless, fully digital case management workflow and data insights for more effective responses to clients. With handoffs between teams and approval chains flowing in a frictionless manner, the process of completing service requests becomes much faster, which ultimately translates to greater client experience and satisfaction. With this boost applied across the large number of service requests we face in a day, the benefit experienced will ultimately be accumulated. In the current times, where relationship managers spend 60-70% of their time on non-advisory activities<sup>20</sup>, this significant time saved can be used on more impactful interactions with clients and revenue-driving activities.

A seamless, fully digital case management workflow with data insights can ensure more timely and effective responses to clients.





# REASON 7

## TRANSFORMING DATA INTO INSIGHTS AND SALES OPPORTUNITIES

Based on a report by BCG, advanced data analytics can bring about a wealth of benefits to a wealth management business - including a substantial increase in AuM, client acquisitions and retention<sup>21</sup>. Using intelligent business analytics and digesting a mass of data to generate valuable insights for users, Wealth Dynamix goes further than other CRM solutions by allowing you to continually monitor progress against these benefit initiatives or, put another way, targeted outcomes.

### Configurable cross-book analytics and insights

As you would have seen from Reason 1 (Single source of truth) and Reason 3 (More efficient collaborative ways of working), the Wealth Dynamix solution contains not just true clean data, but also a great depth of information across different teams and points of the client lifecycle journey. This gives us the ability to generate sophisticated cross-book analytics and insights. For example, relationship managers can have an overview of the type of marketing activities their clients have participated in. This provides them with more information on their interests and allows better personalisation of services or even identification of sales opportunities. If a relationship manager sees that his client has been opening various marketing emails on ESG themes, he might find it opportune to discuss a Green Fund the firm is launching with the client. If a client has been mass selling his holdings over several days, the wealth manager could receive an alert on the client's negative sentiment behaviour to take action.

The marketing team can also view client behavioural trends across the business to identify popular themes or specific client segments for personalised and targeted campaigns - which have 82% higher opening rates than general promotion emails, according to research by Deloitte<sup>22</sup>.

With data insights that can be generated according to the firm's priorities, Wealth Dynamix serves as a solution that value adds to your daily work and arms wealth managers with greater insight to provide an exceptional client experience.

Wealth Dynamix platforms contain not just true clean data, but also a great depth of information across different teams and points of the client lifecycle journey providing the ability to generate sophisticated cross-book analytics and insights.

21 | How to make data science work for wealth management - Blog - Knowledge Hub - Avalon

22 | Connecting with meaning - Hyper-personalizing the customer experience using data, analytics, and AI (deloitte.com)





# REASON 8

## PARTNERING FOR SUCCESS

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At Wealth Dynamix, we partner with clients, technology providers and implementation specialists for the long term. High-quality client service is mission-critical and must be underpinned by technology that is robust and functionally rich. Through our partnerships with reputable technological firms and advanced infrastructure, our solutions give you peace of mind that your CLM platform will be reliable, accessible, well-maintained and secure.

Wealth Dynamix works with you to deliver immediate and ongoing savings and also partners with you to create a more collaborative and connected way of managing client relationships, now and into the future. We understand client expectations, and we empower you to deliver.

We understand that your ultimate goal is to take the heavy lifting out of your CLM processes, and while some may begin tackling the entire CLM process from the outset, we know that others will want to address one element at a time. Our solutions offer a range of modules that can be rolled out as and when needed over the lifetime of our partnership.

Do you want to address onboarding first? No problem. Or maybe you've set your sights on creating more effective marketing campaigns by integrating feedback from relationship managers into messaging and delivery? We can help you achieve your goals. Regardless of whether your infrastructure is more suited for a SaaS, cloud or on-premise solution, we have the option that is best suited for your needs.

Whatever you decide, Wealth Dynamix is your flexible CLM partner for the future.

We understand client expectations,  
and we empower you to deliver.





# REASON 9

## DELIVERING GREATER RETURN ON INVESTMENT (ROI)

Although it tends to be neglected by many firms, Wealth Dynamix believes a good business case is key to unlocking the go-ahead on a given business change initiative. After all, any investment in technology requires a thorough understanding of the business outcomes expected, along with a full appreciation of the likely cost and time savings.

At Wealth Dynamix, the calculation is easy. Examples of returns reported by current clients include:



0% rekeying



Near to 100%  
first-time-right  
onboarding



60% improvement in the efficiency of  
complex processes, as determined by  
man-hour inputs from internal staff

Furthermore, if you are in doubt, Wealth Dynamix also partners with carefully selected delivery and consultancy firms to support clients needing specialist help in assessing requirements or implementing a CLM solution. Based on past experiences with clients, the Wealth Dynamix team can assist in realistically estimating key metrics of implementing our solution - such as time to payback and Net Present Value (NPV) of the project.

Aside from just the initial business case, Wealth Dynamix can also capture the same sorts of metrics in the system for wealth managers to fully determine if these KPIs are being hit - such as the length of time taken at each stage of the client process (e.g. onboarding, complaint management), and where that sits versus the target.

With metrics that are transparent to you, the Wealth Dynamix system can assist management to strategically identify key points of weaknesses in processes and subsequently work on solutions for improvement.

We believe a good business case is key to unlocking the go-ahead on a given business change initiative.





# REASON 10

## ACCESS TO AN ABUNDANCE OF WEALTH MANAGEMENT EXPERTISE

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Last but not least, Wealth Dynamix is an award-winning CLM solution crafted by wealth managers and built by WealthTech experts. Our highly experienced staff have worked in wealth management for decades. We knew we could deliver clear and sustainable improvements in client acquisition, client engagement, digital onboarding, regulatory compliance, relationship management and ongoing client servicing.

We understand the regional differences relevant to wealth management, and we tailor our solution to address your challenges. We have scrutinised the reasons why advisor adoption of CRM is so low, and we have created an easy-to-use CLM solution that encourages adoption.

Every Wealth Dynamix client is a private bank, wealth manager or asset manager, ranging from mid-sized regional firms through to industry-leading global enterprises.

Having deep knowledge of CLM is the foundation for breakthrough solutions, shorter implementations, more predictable outcomes and greater value for money. What puts Wealth Dynamix on a competitive edge over others is that aside from a strong technical foundation of CLM systems, the team also have an abundance of expertise and experience in the particular field of wealth management. No other company can match the combined breadth and depth of CLM and wealth experience offered by Wealth Dynamix; a combination that allows us to meet the continually evolving requirements of our firms and their clients globally.

- If a provider you speak with can't demonstrate expertise in wealth management, can they really fully understand your challenges?
- If they can't provide a platform encompassing all of the client touchpoints within your firm, can they deliver a genuine end-to-end CLM solution?
- If they can't provide access to enriched client data across multiple departments and teams, can they deliver a holistic client view?
- If they focus primarily on just one part of the process, such as onboarding and KYC, can they genuinely support a full CLM, from initial engagement right the way through to ongoing client servicing?

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# WEALTH DYNAMIX

## WHY WEALTH DYNAMIX?

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At Wealth Dynamix we specialise in wealth management Client Relationship Management (CRM) and Client Lifecycle Management (CLM).

Since 2012, we have been partnering with large to mid-sized financial services organisations to help deliver exceptional client servicing quickly, efficiently and cost-effectively.

We have offices and clients in three continents, award-winning implementations, stand-out technology, unrivalled functionality and world-class support services.

Trust Wealth Dynamix to help you manage client servicing more effectively.

## ABOUT US

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Founded 2012

Privately owned

Headquartered in London, UK

Offices in New York, Zurich, Geneva and Singapore

150+ staff with decades of experience in wealth management

## SOME OF OUR LATEST AWARD WINS

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**2019** - Best CRM solution, Goodacre

**2020** - Overall Award, Celent

**2020** - Best Client Lifecycle Management Solution, Asian Private Banker

**2021** - Functionality Award, Celent

**2022** - Best CLM Solution, WealthBriefing Asia awards

**2022** - Best Digital Offering, WealthBriefing Asia awards

## OUR CLIENTS

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Schroders

Rothschild & Co

RUFFER

Rathbones  
Look forward

  
QUILTER CHEVIOT  
INVESTMENT MANAGEMENT

CHARLES  
STANLEY



## CONTACT US

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Interested in learning more about Client Lifecycle Management?