Client portal

The gateway to a better client experience

A sophisticated, multi-channel digital client experience is increasingly critical to the success of your wealth management relationships. Clients' service expectations are changing rapidly as digital technologies become enshrined in our everyday lives. So it is vital you can empower your clients by equipping them with interactive tools and the information they want, when and how they want it.

A client portal is key. Our solution, with its modern, responsive design, delivers powerful interactive capabilities that enhance the engagement experience throughout the client lifecycle, helping you build and strengthen those all-important client relationships, while reducing the operational effort involved.

Optimizing client onboarding

SS&C Advent's portal solution enables you to demonstrate your products and services during the initial client sales meeting, allowing you to illustrate the maturity and breadth of your offering. You can automatically capture the risk profiles of clients and prospects too. Our solution lets you define the risk profile questionnaire and input responses to the questions. The resulting risk rating means you can instantly suggest the right product to match the client or prospect's needs.

A richer client experience

In an age of enhanced regulatory demands, intense competition and rapid technological development, firms' engagement strategies also need to be more responsive to client expectations. Clients want the ability to stay on top of their portfolios, with easy access to performance data and underlying securities information, anytime, anywhere. Empowering clients in this way though requires a multi-channel servicing approach built on two-way interactions and transparency.

Our portal integrates seamlessly with your portfolio management, order management and other core systems to provide a real time, 360° view to your clients—giving them immediate access to trading and investment management capabilities, reporting services, and portfolio and transactional-level data through their choice of device. Clients can swipe across multiple asset allocation views, or export data for further analysis as required.

Boosting efficiencies

With such comprehensive self-service capabilities at their fingertips, and a complete view of their investments, clients are less likely to contact your teams with ad hoc information requests, reducing the pressure on your internal resources. However, in situations where they do require additional support, our solution enables clients to interact with your firm and submit service requests. Through this flexible, two-way portal, you can ensure your clients' interests remain at the heart of your service proposition, while providing opportunities to educate them about your wider service offering.

Enable your relationship managers

SS&C Advent's portal solution empowers your relationship managers as well. By providing instant and complete access to prospect, client and portfolio data, it saves your relationship managers huge amounts of time, while improving the quality of their client interactions.

The portal can connect to CRM and portfolio management systems, helping staff automatically track and manage their client relationships for maximum impact with the minimum of effort—whether they are in the office or on the road. Armed with a full array of up-to-date client and portfolio information, relationship managers can better prepare for client meetings and reviews, and collate relevant reports. Post-meeting notes and actions can be logged and tracked through the portal as well. Once the necessary client approvals have been agreed, advisors can also make changes to the engagement and input orders on their clients' behalf.

And because administration processes such as risk profile capture and request handling are automated, relationship managers have more time to focus on high-value activities that will nurture your client relationships.

Alleviate the compliance burden

Ever increasing and changing regulatory requirements are placing added operational burdens on financial institutions, forcing them to track and audit their entire client onboarding and documentation production processes. By automating a wide number of client interaction and reporting activities, our solution makes it easier to demonstrate compliance with these heightened regulatory demands. For example, automating the risk profiling process reduces firms' reliance on paper records, and helps operational staff confirm that mandated processes have been completed appropriately.

Maximum security

Robust security has become a critical issue to all financial institutions, especially in this age of increasingly sophisticated cyberattacks, where the reputational impact can be as damaging as the immediate financial cost.

To counter these threats, the SS&C Advent portal has been designed using best practice security architectures. The solution can be readily integrated into your existing authentication processes and supports the use of security tokens. And where required, SS&C Advent has the expertise to work with your teams to ensure compliance with your security standards.

Tailor made for you

Our solution is completely white-labeled. It is simple to deploy and easily integrates with your front-, middle- and back-office systems. The solution is highly configurable, giving you the flexibility to apply your corporate identity and branding preferences to the web portal and mobile apps, which can also support any language, including right-to-left languages such as Arabic.

SS&C Advent Portal features	User benefits
Automated account opening and risk profile capture	Efficient client onboarding that satisfies compliance responsibilities, and delivers a responsive, high quality client experience
Seamless integration to external systems	Provides real time, 360° views of client investments through any device
Powerful self-service capabilities	Produces more engaged and satisfied clients, while reducing the administration burden on internal teams
Ready access to prospect, client and portfolio data	Enables relationship managers to improve client interactions, and frees up time to focus on nurturing relationships
Highly configurable, white-labeled solution	Branded to match your firm's image, creating a unified client experience
Flexible, best practice security architectures	Supports the use of security tokens and can be easily integrated into your existing authentication processes

The portal to business growth

To be successful in today's demanding digital world, institutions need to differentiate their service offering. Whatever your needs and ambitions, our solution has the tools and flexibility to support your current and future business models.

Contact us at advent@sscinc.com to learn more about how the SS&C Advent suite of tools can help.