Advisor and client portal

Thrive on a better client experience

With the digitalization of our everyday lives, we now expect instant access to any information that matters to us. And money matters to everyone. Today people expect full visibility into their investments 24/7, and many also want the ability to manage their own money. We can help you give your clients the digital experience that they want, and your advisors the tools that they need, to build the trust that you depend on in your business.

Our solution, Investrack, with its modern, responsive design, delivers powerful interactive capabilities that enhance the engagement experience throughout the client lifecycle, helping you build and strengthen client relationships, while reducing the operational effort involved.

Optimize client onboarding

Investrack enables you to demonstrate your offering from the very first engagement. You can automatically capture the risk profiles of clients and prospects, based on a fully customisable risk profile questionnaire. The risk rating generated from the suitability assessment allows you to instantly suggest the right product to match the client or prospect's needs. You can even choose to offer self-onboarding, with fully automated risk profiling and investment model proposals.

Provide a richer client experience

With Investrack, your clients can stay on top of their portfolios, with easy access to performance data and underlying securities information, anytime, anywhere. They can manage their own investments through self-service trading, or by communicating with their advisor securely and efficiently through the portal.

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

Boost 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, and communicate with them in their preferred way.

Empower your advisors

By providing instant and complete access to prospect, client and portfolio data, your team saves 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, advisors 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 many processes are automated, advisors 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.

Ensure 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, Investrack 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.

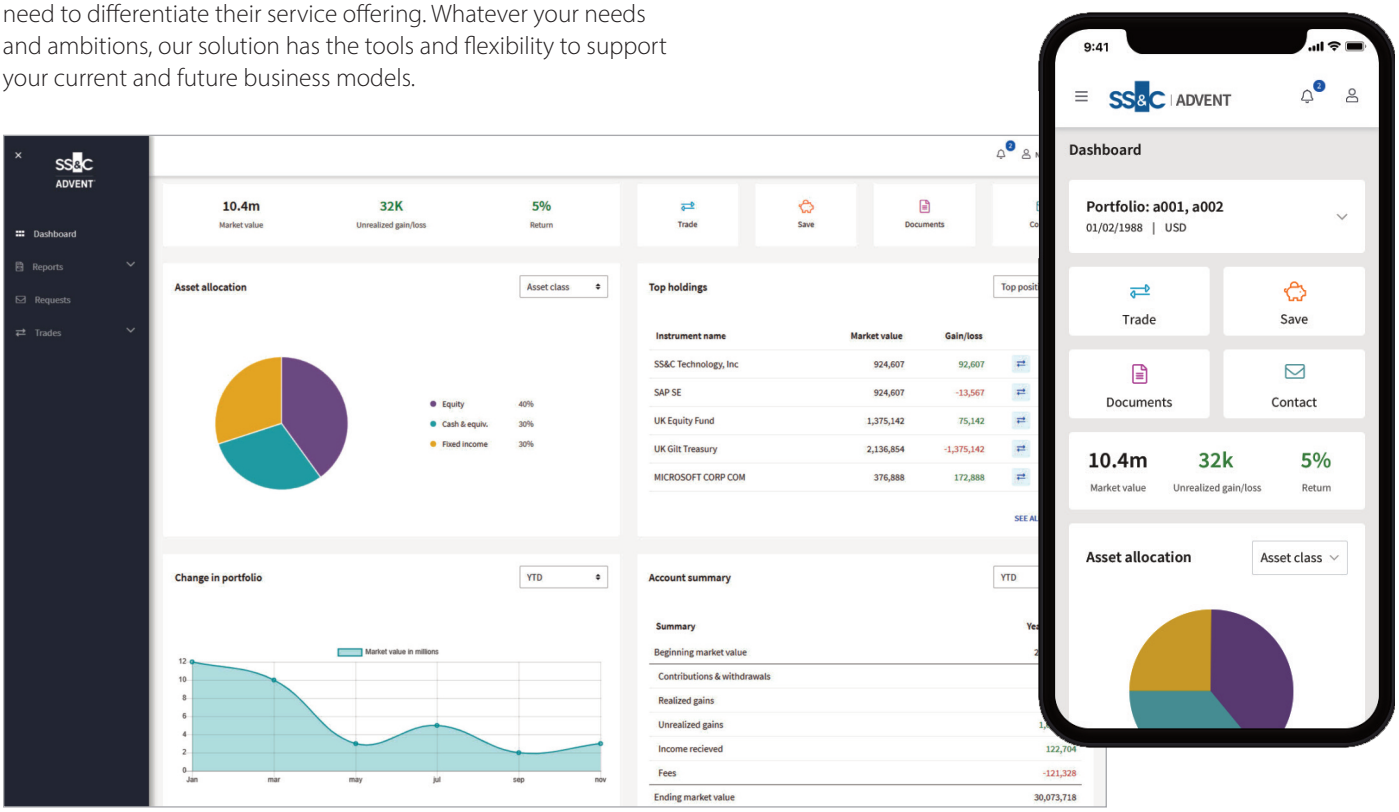
The portal to business growth

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.

Features	Benefits
Automated account opening and risk profiling	Efficient client onboarding that satisfies compliance responsibilities, and delivers a responsive, high quality client experience
Seamless integration to external systems	Provides real time, 360º views of client investments through any device
Powerful self-service capabilities	Gives more engaged and satisfied clients, while reducing the administration burden on internal teams
Ready access to prospect, client and portfolio data	Enables advisors 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

Contact us

To learn more how our portal can help your business, please contact advent@sscinc.com.



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