Turning Disorganized Data Into Enriched Experiences

Wealth Management

- PRIVATE BANK
- PORTFOLIO ACCOUNTING
- ADVISORY / CUSTODIAL
- HELD AWAY ACCOUNTS
- PERFORMANCE REPORTS
- BROKERAGE
- STATEMENTS
- RETIREMENT
- TAX REPORTS
- TRUST

Consumer Banking

- STATEMENTS
- DEPOSITS
- LOANS
- HELD AWAY ACCOUNTS
- TAX REPORTS
- MORTGAGES
- CREDIT CARDS

Commercial Banking

- TAX REPORTS
- DEPOSITS / LOANS
- STATEMENTS
- HELD AWAY ACCOUNTS
- BUSINESS FINANCIALS

Open Architecture

- DATA API
- WIDGET API

Integrations

- FINANCIAL WELLNESS
- FINANCIAL PLANNING
- ONBOARDING
- CRM
- DATA WAREHOUSE
- DIGITAL BANKING
- RISK ANALYSIS
- SBL

Create Actionable Insights Across the Enterprise

- WEALTH INSIGHTS
- CONSUMER INSIGHTS
- COMMERCIAL INSIGHTS

Personalize Digital Experiences with Roles-based User Management

- HNW CLIENT
- CONSUMER
- SMB OWNER
- ADVISOR
- EXECUTIVE
- BANKER

wealthaccess.com / sales@wealthaccess.com / 866.612.0324

Unify your data. Enrich your experience. Act on deeper insights.

The what, how and why of building a better business with Wealth Access.

DATA UNIFICATION

+ CLIENT RETENTION & GROWTH + COST SAVING + EXPERIENCE + OPERATIONAL EFFICIENCY DIFFERENTIATOR

What	How	Why
Wealth Access collects data from across all existing systems of record, technology platforms, and custodians to create a single, unified location for all client information. The result is increased internal efficiency and a comprehensive financial experience for customers.	• Establish non-disruptive, secure direct data feeds and API access to core systems with configurable automated mapping controls. • Rationalized under the Wealth Access Universal Client record. • No data conversion required. • Client-directed held-away account collection.	A complete and consistent client experience helps you discover and capture unrealized revenue opportunities within your four walls. Plus, a single pane of glass experience provides comprehenive relationship and total balance views to your financial professionals, unlocking the power of your data.

EXPERIENCES

+ CLIENT RETENTION & GROWTH + COST SAVING + EXPERIENCE + OPERATIONAL EFFICIENCY + DIFFERENTIATOR

What	How	Why
Using comprehensive, complete customer relationship views created through the process of Data Unification, Wealth Access gives your team the ability to create personalized, roles-based digital experiences that are consistent across desktop and mobile devices.	Create fully branded, configurable and personalized digital experiences optimized for each role across your enterprise and clients. • **Retail Consumer** • **Business Owner** • **HNW Client** • **Executive Management** • **Commercial Banker** • **Wealth Advisor**	Where people access financial information is one of your organization's most critical interaction points. Personalized, high-touch digital experiences drive overall adoption, keep the focus on the user, and demonstrate value with complete relationship views and comprehensive financial balance sheets.

INSIGHTS

+ CLIENT RETENTION & GROWTH + COST SAVING EXPERIENCE + OPERATIONAL EFFICIENCY DIFFERENTIATOR

What	How	Why
Drive awareness and inspire action in your organization with automated identification of opportunities and risks based on institution-defined business rules.	We analyze underlying clients, accounts, holdings and transactions against institution-defined business rules to automatically display potential opportunities and risks. A custom dashboard prompts action, and progress management and reporting provides organizational visibility.	Automate the identification of potential revenue opportunities you might otherwise miss, and get recommended next best actions. Enterprise visibility ensures follow-up and enforces consistency across your teams and business lines.

CRM

+ CLIENT RETENTION & GROWTH	+ COST SAVING	EXPERIENCE	+ OPERATIONAL EFFICIENCY	DIFFERENTIATOR

What	How	Why
For most organizations, the CRM is the hub. Wealth Access integrates enriched data and personalized widgets directly into your enterprise's or department's chosen CRM.	No conversion necessary! We establish non-disruptive, secure direct data feeds and API access to your core systems using configurable, automated mapping controls. The data is rationalized under the Wealth Access Universal Client record, and we even enable client-directed held-away account collection.	Access to full financial balance sheet information within a CRM creates a single pane of glass experience for financial professionals. Our no-conversion process also reduces the size and complexity of multiple CRM integration projects across the enterprise.

INTEGRATIONS

CLIENT RETENTION & GROWTH	+ COST SAVING	+ EXPERIENCE	+ OPERATIONAL EFFICIENCY	DIFFERENTIATOR

What	How	Why
Data locked away on its own doesn't do anyone any good. Enhanced integrations unlock your unified data for use in other enterprise technology components.	Through Wealth Access' Open Architecute environment, automated or user-initiated integrations eliminate the need for recollection or re-keying of information in other supported applications.	Reduce time and efforts associated with data collection to drive operational efficiency across the organization, and improve the Client Experience with consistent delivery for every customer.

TRANSACTION ENRICHMENT

CLIENT RETENTION & GROWTH	+ COST SAVING	+ EXPERIENCE	+ OPERATIONAL EFFICIENCY	+ DIFFERENTIATOR

What	How	Why
Better knowledge creates a better client. Significant improvements to transaction categorization enrich the Client Experience, providing customers with complete insights into the details that create their living Balance Sheet.	Wealth Access processes bulk transaction files and enriches their data with advanced categorization and merchant details. Those enriched files can be returned to the source to generate enhanced digital experiences.	Financial professionals gain greater insight when advising on budget and spending, and customers enjoy an improved digital Client Experience. And because enriched data can be synced both ways, your firm avoids expensive technology customization.