



Based on Microsoft Dynamics CRM, Wealth+ has been designed and developed to be integrated to your internal systems and to answer to the particular security and confidentiality rules of the Luxembourg Market.

This solutions works online and on premise with Microsoft Dynamics CRM 2016.

A NEW WAY TO MANAGE YOUR NET WORTH

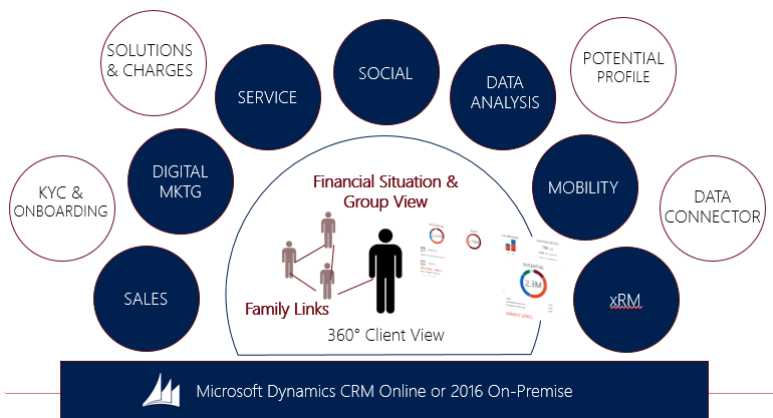
Can I have a view on my **partners Pipeline**? How to get a **complete view** of a client AUM? How to ensure the **processes** compliancy? What is the **potential** of my client?

One of the greatest challenges of the wealth management industry today is to identify client potential. Wealth+ is suitable for wealth managers as well as life insurance experts and private bankers, giving them a clear overview of their clients' potential and allowing them to categorize their profiles.



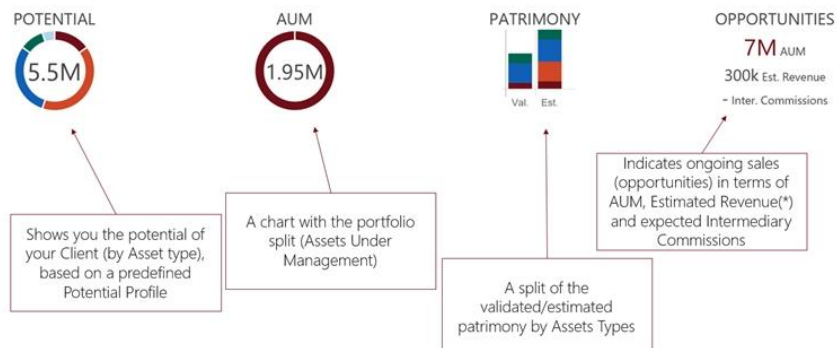
A ONE-STOP SHOP

- Assets Overview
- Solutions catalogue & Opportunities
- Know Your Customer Information
- Onboarding Processes
- Group view (of family members or members of a group)
- Risk Profile
- Clients' Potentials
- Partners Commissions and Company Charges
- Back-end Data Connector

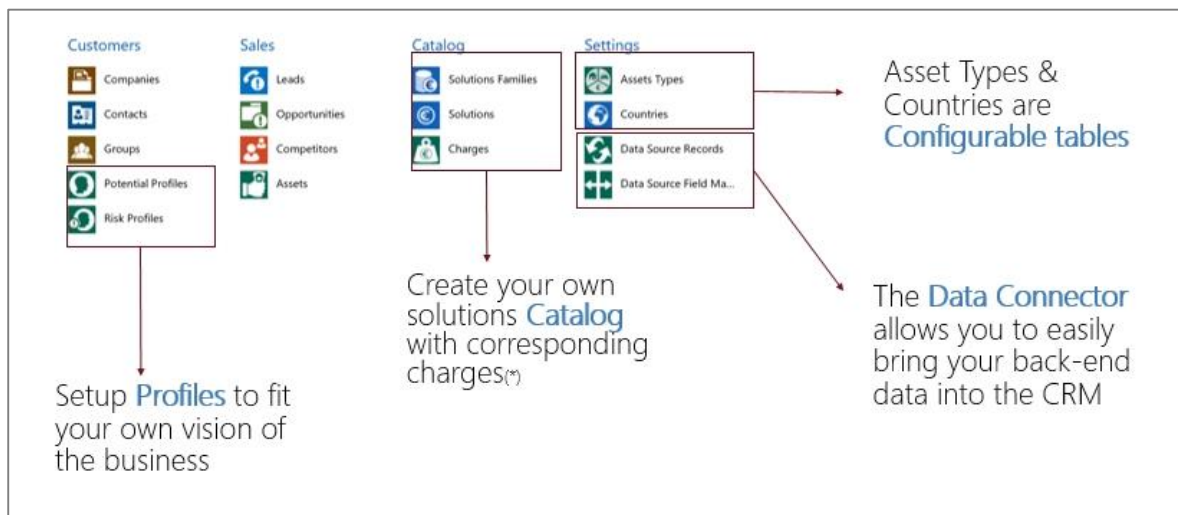


FINANCIAL SITUATION & GROUP VIEW

The solution brings together all the information about each member's net worth and potential, whilst providing graphs that gather essential data such as portfolio spread and revenue generated for your organisation.

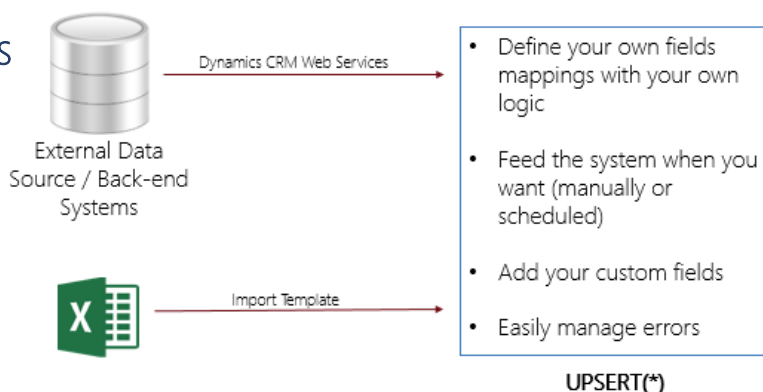


A CUSTOMIZABLE AND FLEXIBLE SOLUTION



EASILY CONNECT YOUR BACK-END SYSTEMS AND LET WEALTH+ SHOW THE DATA!

- Connect your data sources through web services
- Inject your data sources through a template provided with the solution



(*) Insert the record into the system if it does not exist yet. Update it if the records already exists.

SOLUTIONS LAYERS

- Dynamics CRM**
- Wealth+ Core Pack**
- Wealth+ Setup**
- Specific Customs**

Dynamics CRM: CRM 2016 On-Premise or Online installation

Wealth+ Core Pack: Dynamics CRM Solution that includes Pipeline Management, KYC, Data Connector, Group View, Potential Profiles

Wealth+ Setup: NEREA service (included in the licence): Software configuration, one Import, Setup, Trainings

Specific Customs: NEREA service (Request Proposal): Any specific customisations or developments **on top** of the solution