SOLUTION
WEALTH MANAGEMENT ADVISOR PORTAL

rivetlogic

The Need for Modern Wealth Management Tools

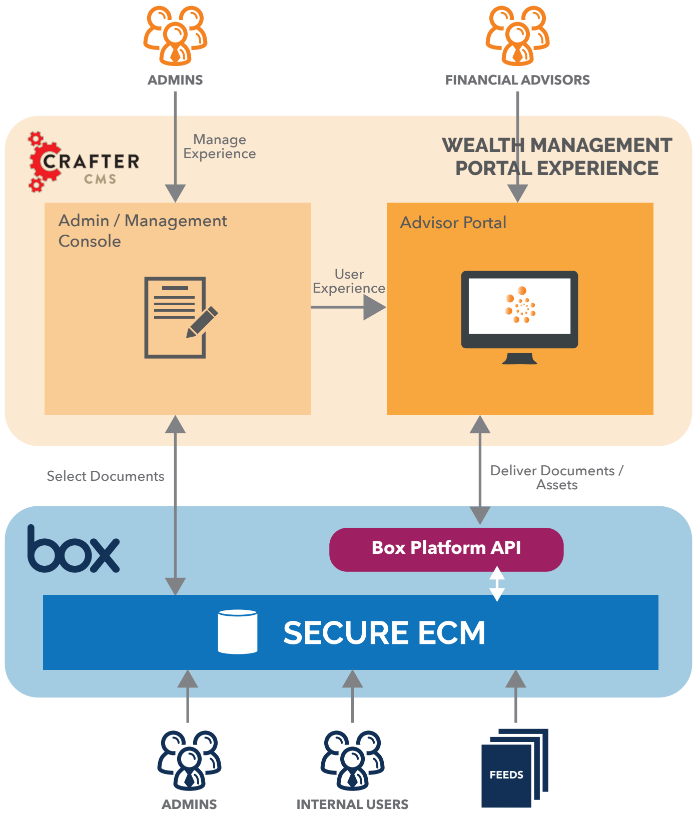
The financial services environment is constantly evolving, and companies who learn to leverage technology can gain a competitive edge. Consumers engage in wealth management services for the valuable insights of an experience advisor, along with the personal relationship of that advisor.

However, consumers today expect the same level of personalized experience as they would from companies like Amazon and Netflix. And with digital investing tools, aka "robo-investing", on the rise as an easy way for investors to leverage wealth management online, traditional wealth management advisors need better tools to help them engage with clients and drive revenue.

EMPOWERING WEALTH MANAGERS TO BETTER MANAGE THEIR CLIENTS

When customers engage with a financial advisor, they expect a level of service that feels both personalized and modern. This means financial institutions need to integrate advanced tools into their offerings to equip their advisors with the means to better understand and manage their clients.

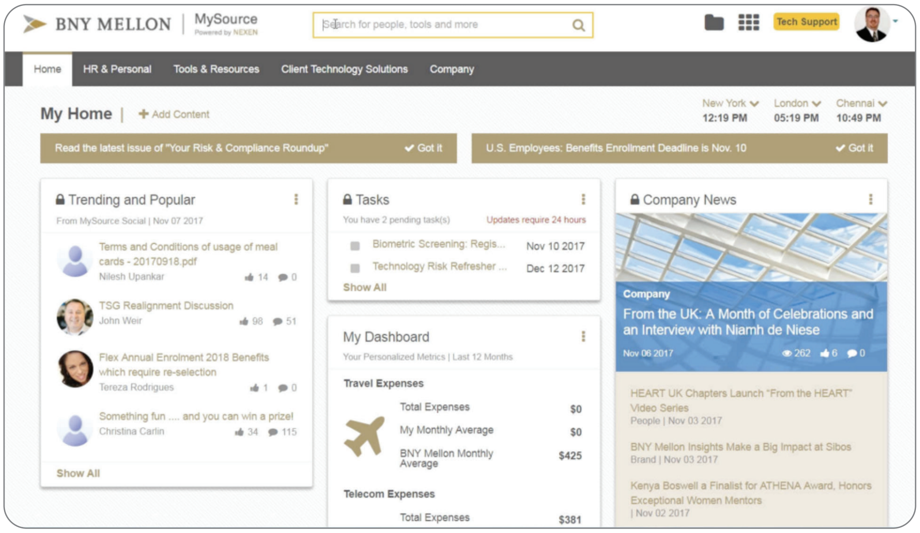
Financial advisors need the ability to quickly and easily access a variety of wealth management related information at their fingertips, including institutional information, investment products and solutions available, market insight and analysis, assessment tools, client portfolio snapshots, among other resources.



Rivet Logic's Wealth Management Advisor Portal provides wealth management professionals with a centralized solution for on-demand access to all the information they need to manage their clients. The solution leverages Box Platform's powerful and secure cloud content management capabilities for storing all enterprise content. The portal experience is created through Crafter CMS, providing a user-friendly interface for financial advisors to quickly navigate and access the content they need, when they need it, through their device of choice.

The result is a solution that empowers wealth managers to not only improve existing customer relationships through exceptional customer service, but also increase new revenue through more effective customer acquisition.

The advisor portal provides a centralized solution to empower wealth managers to be more productive in their everyday tasks.



FEATURES

- Manage all documents securely straight from within the wealth management portal
- Managed business process with gated approvals
- Secure document sharing
- Dashboards for easy/intuitive portfolio management

BENEFITS

- Enhanced content findability
- Increased productivity
- Improve existing customer relationships
- More effective new customer acquisition