

CRM solution for Wealth Managers

A WORD FROM THE FOUNDER

Remaining competitive in an ever-changing digital world means that wealth managers need access to the latest CRM systems, in order to deliver unrivalled client support.

At AskLogix, we have created a CRM solution to help Wealth Managers: monitor in detail client profiles, facilitate key investments and convert leads swiftly. This overview outlines what we can provide to give you a digital edge over your competitors.

Get in touch today, I would be happy to assist you in your digital projects.



Arnaud Mercier,
Founder & CEO



WHAT WE DO

Asklogix - Wealth Management is a collaboration and productivity cloud-based solution designed specifically for Wealth Managers.

Bringing together **Client Relationship Management, Sales & Marketing and Operational functions across a business**, our solution automates workflows, facilitates collaboration and optimises your operations for growth.

Advisors can build one-to-one relationships with clients for key investment decisions based on goals and life events.

KEY BENEFITS

- **Personalise** interactions with detailed clients profiles centred on personal goals and pivotal life events
- **Connect** with clients from any device, and build stronger relationships by engaging in micro-moments
- **Increase** communication effectiveness with existing clients and prospects
- **Facilitate** Team collaboration - the right information to the right user at the right time - securely!

SUPPORTED PROCESSES

- Manage leads more effectively and convert them more consistently
- Transform your "home base" of existing clients into an active referral network
- Organise one-to-one meetings, client visits and call reports (follow-up)
- Marketing automation
- Due Diligence
- Events and meetings
- Contacts and document management
- Synchronise e-mails, contacts and calendars with Outlook, Gmail
- Risk and Compliance (CRM)

KEY FEATURES PROVIDED



Solution based on AI & Blockchain technologies

Our embedded **Blockchain extends CRM** - delivering a fast and easy way to build trusted partner networks that share verified, distributed data.

Our solution powered by AI can help users with smart recommendations about a customer or a prospect based on all the data about that person the system has collected.



Automated client Communications & Collaboration

The incorporation of a **branded portal** enables the client to differentiate their reporting, while extending your brand from simple relationship building to high-touch client engagement.

Prospects, investors and their consultants can now all go to a single portal/dashboard and with one login review, manage and produce reports across all entitled funds and accounts.



Compliance and Risk Management

The increasingly rigorous regulatory climate requires new levels of transparency and compliance.

Our solution incorporates a sophisticated Risk and Compliance Management environment, which not only captures all elements of risk via consolidation of disparate data sources, but also **actively predicts** the likely future outcomes.



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