How can an online client portal help drive your business forward?



Client portals both offer clients better access to information as well as reducing low value calls and inquiries into your advisors.

A client portal is a hub for communications between clients and advisors. All communications are in one simple place, avoiding missed calls, emails or letters.



An online portfolio portal is a great way to help younger family members learn about wealth management through a medium that they're comfortable with.

...help you build relationships with your clients wider family? How can a portal.



The next generation will be more likely to engage with a service and relationship that they can connect with through their mobile devices.



A client portal can free advisors from many of the tedious and time consuming client administration tasks. This is time that can be better spent dealing with more clients' needs.

Growth retaining assets

...improve referrals?



A client portal creates opportunities for richer communications and more valuable services to be delivered to clients. Both are effective ways to drive referrals.

The costs of paper reporting to clients shouldn't be underestimated. Providing online account access through a client portal reduces the costs of printing, organising and storing vast amounts of paper copies.

...reduce the number of clients per advisor?

> Cost reduction

What's your business priority?



Client portals allow clients to view and review their assets in real time. This can only make you more prominent in their thoughts and conversations with friends and colleagues.

The automated workflows behind your client portal will vastly reduce administration and manual processes.



...reduce your

operational

overhead?

By simplifying client and advisor interactions, a client portal provides greater visibility on your decisions, allowing you to service your clients faster.

How can a porta ...help you acquire new firms or attract new advisors?



Because client portals pull a client's information together from all necessary sources, when it comes to preparing for client meetings or reviews, you can save huge amounts of time.



Client on boarding is hugely simplified by a client portal. Capturing client information is simple and all of the necessary processes are automated.

