

Asset insight

The problem

- Some people **want to invest** but don't know how
- They **prefer their own research** (outside office hours) over a discussion with an advisor
- They find it difficult to apply the available **generic information** to their individual situations

The solution

Better tools

for individual customers
to find investment products
that suits them best

By the way...

By empowering the customers, the bank can
increase sales
and
enhance customer satisfaction
while
reducing costs

Tina



- Wants to take a sabbatical year to travel the world
- Has some estimates of the costs
- Expects to be saving for the trip for 5 years
- “What’s the right way for me to save?”
- Takes her tablet and goes to Asset Insight

Lisa and Jack



- Lisa is leading a successful career
- Jack stays home taking care of the kids
- Lisa's salary more than covers the daily living costs
- "What's the right way for us to save?"
- Asset Insight

Harry



- Near retirement
- Current income exceeds expenses significantly
- Worried about pension income - “Will I be poor?”
- “What’s the right way for me to save?”
- Asset Insight

Common characteristics

- They want to compare alternatives,
- They want to make their own choices
- They all hate telemarketing and “being sold to”
- They could listen to unbiased expert advice