

Winning Software Solutions for:

Wealth Management

Financial Advisory

Private Banking

Asset Management

Private Life Insurance

How winning firms are reshaping their Wealth Management

Due to the financial crisis the Wealth Management industry is in the middle of a reorganization and the gap between winners and also-rans is still spreading.

In order to capture new money inflows winners adopt two strategies: a customer centric advisory approach with an open product architecture and a service model able to assure compliance, client oriented reporting and wealth protection.

Some of them have successfully implemented these strategies by adopting a single operating platform: ObjectWay Financial Suite - OFS.

OFS is the innovative and proven Wealth Management Platform that fully supports the provision of advisory, discretionary and brokerage services to all customer segments, from Mass Affluent to HNW investors.

OFS Wealth Management Platform dramatically improves your processes for Client Management, Sales Management, Personal Financial Planning, Portfolio Management, Alert Management, Compliance, Client Reporting, and Management Control.

OFS is used by more than 90 financial institutions in Europe. It is employed by about 10,000 personal bankers in 6,000 branches, 2,000 private bankers, 35,000 financial advisors, 2,500,000 on-line individual investors.

To know how Global Winners like Barclays and Unicredit use OFS to support their innovative Wealth Management service model, please download the free white paper from www.objectway.com or call on +39 (0)2 89.800.1 for a live demo.



ObjectWay Wealth Management™
Smart & Flexible