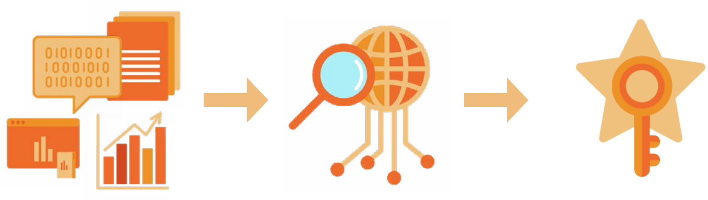
squirro

Wealth Management Solution

Enhance the client acquisition and retention, and unearth portfolio allocation opportunities through Augmented Intelligence

It's an on-going challenge for financial advisors to grow their client base, improve client retention, and increase profitability. To do so, financial advisors must make the best use of the assets at their disposal – this means deriving insight from all their data, including unstructured data, using augmented intelligence.

HOW IT WORKS



GATHER

various data sources in one dashboard

UNDERSTAND

your business needs and extract key insights

ACT

on opportunities that emerge in real-time

SOURCES

- Meeting notes
- Emails and call transcripts
- Internal data
- Premium data
- Changes in existing portfolio
- News feeds
- Risk profiles

WHAT'S IN IT FOR YOU

- Deepen client relationship
- Early trend recognition
- Increase asset under management
- Improved client loyalty
- Reduced churn

HIGHLIGHTS

- Efficient meeting preparation
- Identification of trending area of interest
- Sentiment detection
- Comprehensive client insights cockpit
- Portfolio analysis and according investment recommendations

BENEFITS

- Strengthen client relationship
- Get comprehensive client insights much faster
- Reduce time to analyse data and prepare customer meetings
- Address the customer's specific and actual interests
- Early identification of churn signals

ACHIEVEMENTS

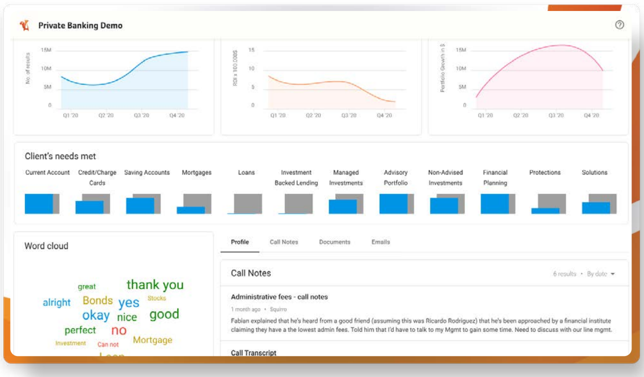
- > 90% recommendation accuracy
- Improved ROI on premium data
- Increased adoption rate of CRM system

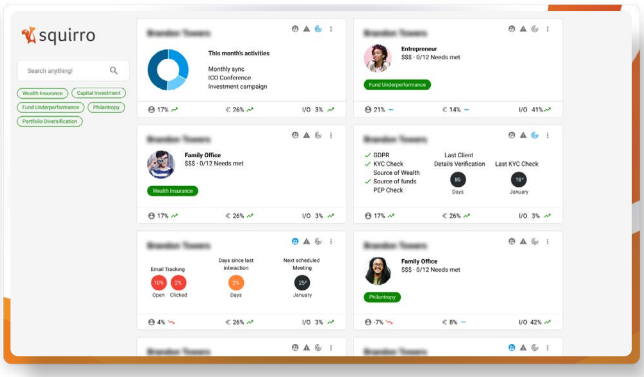
EXPLORE

Augmented Intelligence for Wealth Management

BOOST LEAD GENERATION AND SOURCE INVESTMENT OPPORTUNITIES

Client advisors need to approach affluent, high-net-worth and ultra-high-net-worth clients and prospects as early as they can. Squirro works with a huge range of data sources, giving advisors notifications of any event or catalyst that could result in an opportunity as soon as it takes place. This allows client advisors and relationship managers to approach their clients with highly relevant individual recommendations at the right time.



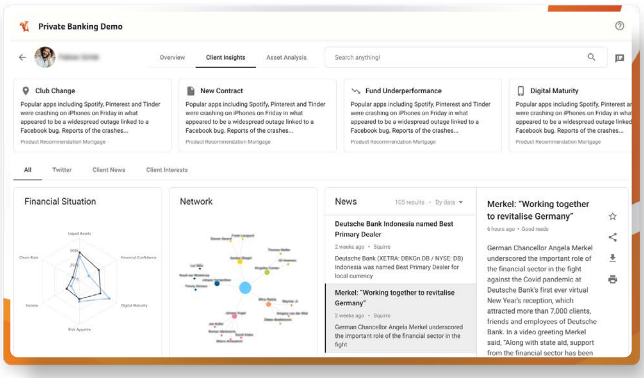


IMPROVE CLIENT PROSPECTING, ACQUISITION, AND RETENTION

Wealth management still relies heavily on trust between a financial advisor and their clients. Our solution helps you to maintain a strong relationship and avoid churn by letting Client Advisors understand clients better through data-driven insights derived from all the data. This includes trending areas of interest as well as client relationship network mappings, which help you to understand the client's network better and ask for introductions.

DELIVER A FIRST-CLASS CLIENT EXPERIENCE

By tracking any deals or investment opportunities across such a wide range of data sources, the Squirro Wealth Management app delivers a first-class client experience. The Squirro Client Advisor Dashboard takes that even further, offering a holistic 360° view of every client and providing financial advisors with deep and accurate insight into each client's activity, preferences and priorities.



OUR CUSTOMERS

Data-driven financial institutions

standard chartered | BANK OF ENGLAND | ING | BROOKSON | Ninety One | CANDRIAM A NEW YORK LIFE INVESTMENTS COMPANY

ABOUT SQUIRRO

Businesses capitalize on new opportunities, improve client relations, and optimize decision-making capabilities using Squirro's vertical-specific Augmented Intelligence solutions, which combine human intelligence with powerful AI. An Insights Engine at its core, Squirro delivers contextualized insights from your most relevant data sources and displays them directly, via workbench integrations, or through self-service applications.

Squirro works with global organizations, primarily in the Financial Services, Insurance, Telecommunications, and Manufacturing industries. Customers include Bank of England, Standard Chartered, ING, Brookson, Ninety-One and Candriam. Founded in 2012, Squirro is currently present in Zürich, London, Munich, New York, and Singapore. Further information about AI-driven business insights can be found at **squirro.com**

Zürich, London, Munich, New York, and Singapore | **contact@squirro.com**

LEARN MORE ABOUT WEALTH MANAGEMENT SOLUTION!