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Driving Profits & Customer Value Through Advisor Dashboards

Financial services firms & investment advisors are racing to become the 'trusted advisor' to the exploding wealth management customer segment. Well-researched and as sophisticated as ever, clients demand greater value from their advisor amidst increased competition and access to new asset classes that is easier & less expensive than previously.

Wealth Management Business Imperatives

Multiple Roles of "Trusted Financial Advisor"

- Baby Boomers are preparing for a long & for some, indulgent, retirement – they represent $25 trillion worldwide retirement-related assets
- Generation Y – the children of Baby Boomers – represent the emerging workforce, projected to be the wealthiest generation ever
- Baby Boomers & Generation Y are driving the biggest shift of wealth in history, but they also represent diverging customer segments, each with unique investment needs & perceptions of value for service & financial advice.

Easier & Inexpensive Access to New Asset Classes

- Increased education & awareness of "new" investment vehicles now accessible by retail, discount & self-directed customer segments -- exchange traded funds (ETFs), index funds, hedge funds offer inexpensive access to new markets, commodities & asset classes.
- Shifting the burden of generating returns from traditional fund managers to financial advisors.
- Access to new markets & asset classes,
- Growing number of cost efficient resources & self-service financial research tools are further polarizing investment styles & tolerances for investment related fees & expenses.
- Increased expectation & pressure to generate "better results" than lower cost investment approaches.

Solution Highlights

- ✓ Customized role-based dashboards & reports for financial advisors, administrators, branch / regional managers & executive management teams
- ✓ Accelerated solution envisioning & design with our proven reference architectures
- ✓ Rapid deployment via 20+ pre-defined dashboard & report templates
- ✓ Benchmark & measure ROI
  - Increase revenue from fee-based business
  - Increase total assets under management
  - Increase household size & quality
  - Increase lift via up-sell / cross-sell
  - Increase % up-take of targeted campaigns & offers

Why Do Wealth Managers Need Advisor Dashboards?

Empower sales force with tools & analytics to provide:

- The right product or service,
- To the right customer,
- At the right time & price.

Drive sales performance & revenue:

- Increase visibility of differentiated customer needs by segment to your sales force.
- Make it simple, fast & easy with a single-integrated view of sales targets, productivity, campaigns & promotions.
- Incent sales behavior to grow high quality households & fee-based revenue via holistic benchmarking against peers or competitors.
- Improving the overall "running of the business" by enabling individual financial advisors to become better 'CEOs' of their business.

Ideaca's Wealth Management Dashboards provide access to real-time data related to revenue by business type, asset class. The solution also outlines related commissions and fees.

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What can you expect?

Accelerated Success with a Packaged Solution

Ideaca's "in-a-box" solution accelerates rapid deployments, so that our clients can more quickly benchmark & measure tangible ROI.

- Increase revenue from fee-based advisory business
- Increase household size & quality
- Increase % up-take of targeted campaigns & offers
- Increase total assets under management
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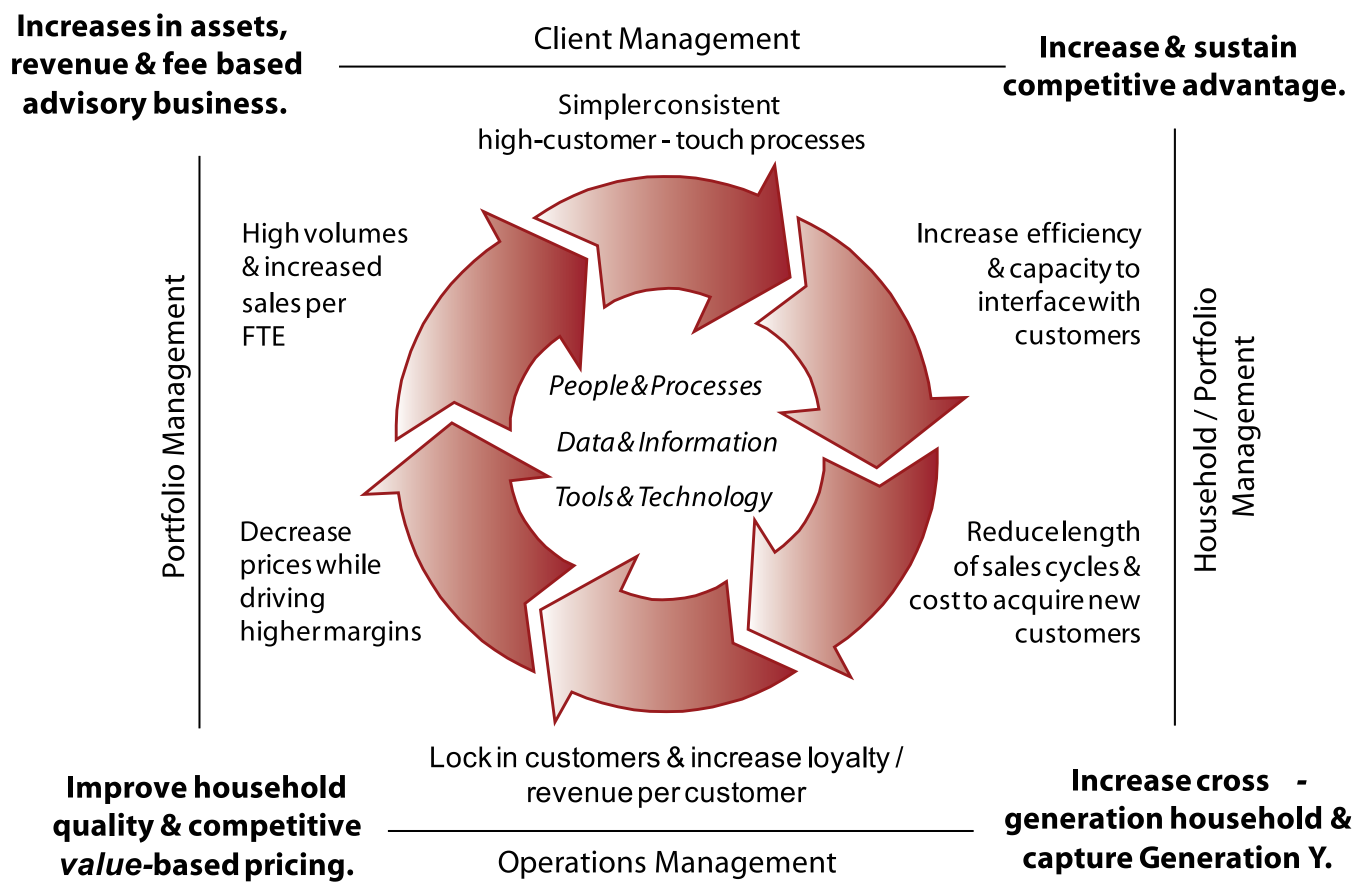

How Can We Help You?

Our experienced team of Financial Services consultants coupled with our solution accelerators and an integrated software offering from Microsoft are all critical components to increasing revenue, sales performance and client satisfaction while reducing your total cost of ownership.

To learn more about Ideaca and our Financial Services Solution Offerings call **1-866-816-IDEA x5157**, or visit www.ideaca.com/finserv

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