

## Driving Profits Through Quality Households & Customer Relationships

In a period of economic uncertainty, financial services firms & investment advisors are racing to become the 'trusted advisor' to the exploding wealth management customer segment. Increased competition combined with easier & less expensive access to new asset classes, well-researched & as sophisticated as ever, clients demand greater value from their financial advisor.

### Wealth Management Business Imperatives

#### Importance of "Trust & Relationship"

- Baby Boomers are preparing for a long & for some, indulgent, retirement – they represent \$25 trillion worldwide retirement-related assets. Loyalty & decision to stick with Wealth Advisors is based on "trust & relationship with Financial Advisors," not portfolio performance.
- The majority of Generation Y, the children of Baby Boomers, turn to their parents for financial advice, choosing the same Financial Advisor as their parents.

#### Seize the Burgeoning "Generation Y" Customer Segment

- Generation Y represent the emerging workforce and are projected to be the wealthiest generation ever.
- The first waves of Generation Y are facing life events such as getting married, purchasing a first home and having a first child, typically triggering long term financial decisions.



Ideaca Wealth Management CRM solutions, modules include relational hierarchy diagrams as well as customer contact management, marketing and sales management, and operational dashboards.

### Solution Highlights

- ✓ Empower sales force with single view to provide:
  - The right product or service
  - To the right customer
  - At the right time & price
- ✓ Build stronger, more meaningful & accurate customer profiles & their households – resulting in more profitable & long term relationships with customers
- ✓ Improve profitability & overall "running of the business" by individual financial advisors to become better "CEOs" of their business.
- ✓ Experience to deliver a tailored solution, from start to finish
- ✓ Rapid implementation with pre-configured modules

### Evolving Definition of Households

- Baby Boomers & Generation Y are driving the biggest shift of wealth in history, but they also represent the importance of capturing within a given household, diverging customer segments, each with unique investment needs & perceptions of value for service & financial advice.
- Definition of household has evolved, encompassing relationships beyond traditional family ties. Leading Financial Advisors possess a holistic 360-view of client households – which include common-law partners, business partners & associates... – and understand each household's financial and investment risk profile, including consolidated portfolios, leads & opportunities.

### What Tools do High Performance Financial Advisors Require to Grow Their Business?

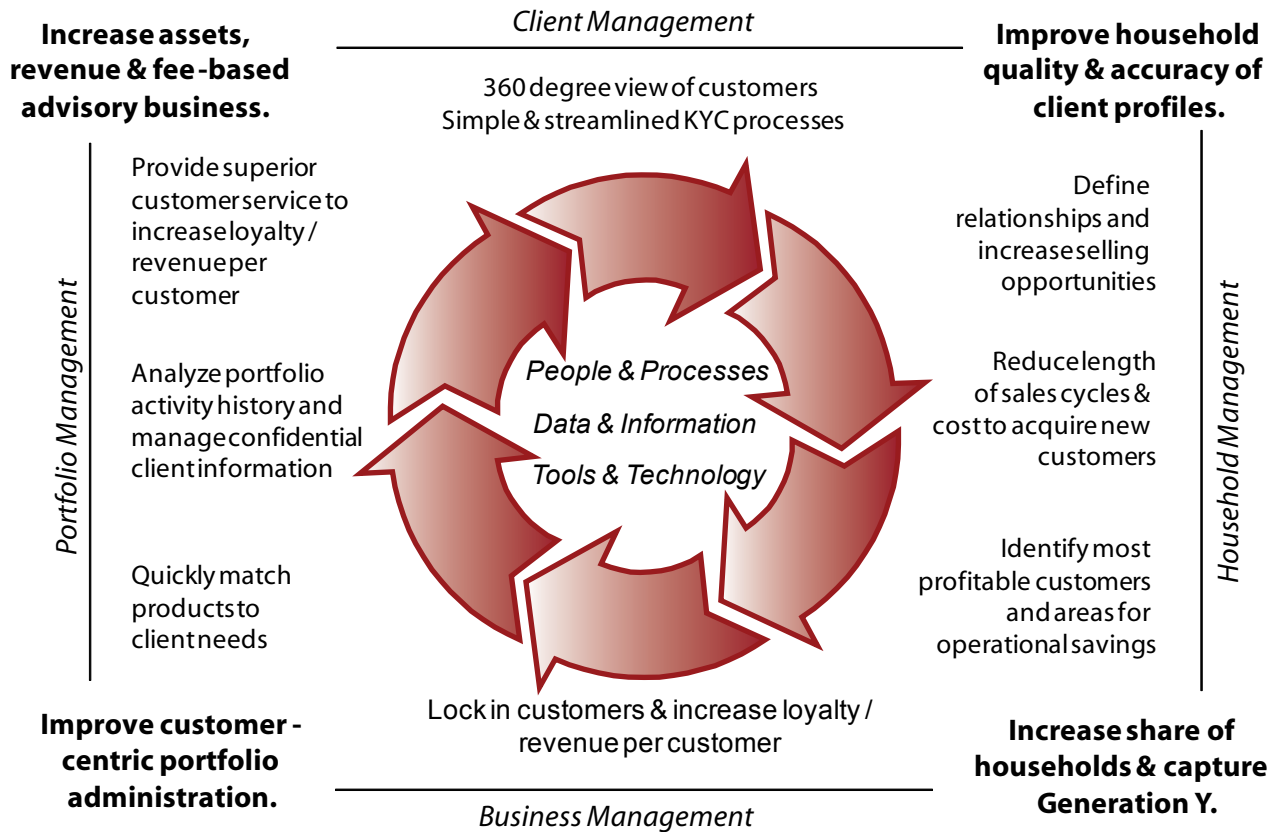
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## What can you expect?

### Accelerated Success with a Packaged Solution

Our "in-a-box" solution with pre-configured industry-specific modules 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
- Increase lift via up-sell / cross-sell



### 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 increase client loyalty, revenue per client and reduce the 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](http://www.ideaca.com/finserv)



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