WEALTH+

The Wealth Management CRM Solution

Dynamics 365

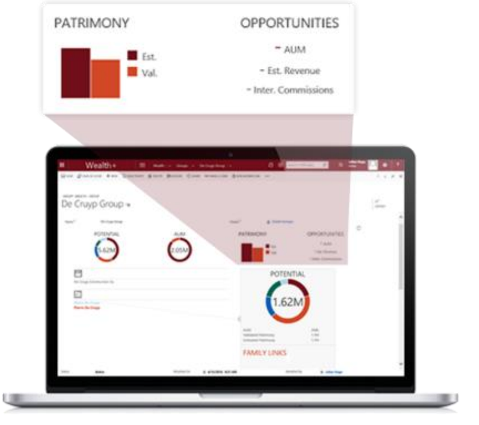
Based on Microsoft Dynamics 365, Wealth+ has been designed and developed to be integrated to your internal systems and to answer to the particular security and confidentiality rules of the Luxembourgish Market.

This solutions works online and on premise with Microsoft Dynamics CRM 2016.

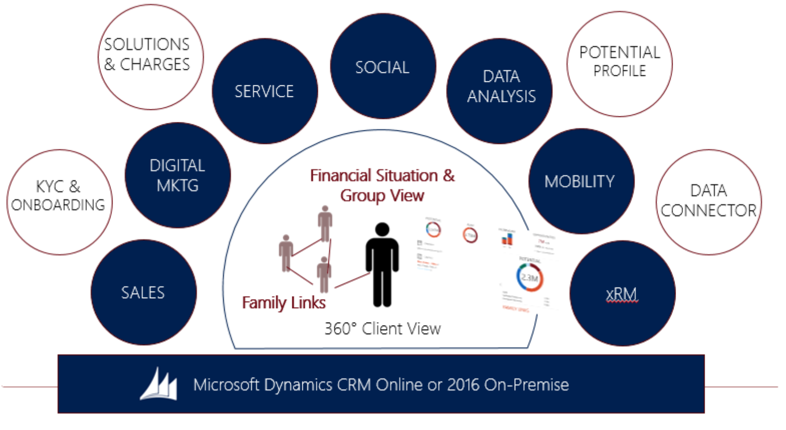
A NEW WAY TO MANAGE YOUR NET WORTH

Can I have a view on my **partners Pipeline**? How to get a **complete view** of a client AUM? How to ensure the **processes** compliancy ? What is the **potential** of my client?

One of the greatest challenges of the wealth management industry today is to identify client potential. Wealth+ is suitable for wealth managers as well as life insurance experts and private bankers, giving them a clear overview of their clients' potential and allowing them to categorize their profiles.



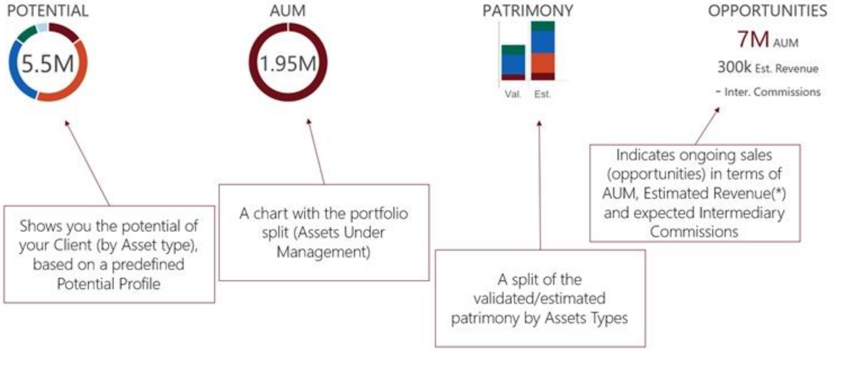
A ONE-STOP SHOP



- Assets Overview
 Solutions catalogue & Opportunities
Know Your Customer Information
- Onboarding Processes
- Group view (of family members or members of a group)
- Risk Profile
- Clients' Potentials
- Partners Commissions and Company Charges
- Back-end Data Connector

FINANCIAL SITUATION & GROUP VIEW

The solution brings together all the information about each member's net worth and potential, whilst providing graphs that gather essential data such as portfolio spread and revenue generated for your organisation.



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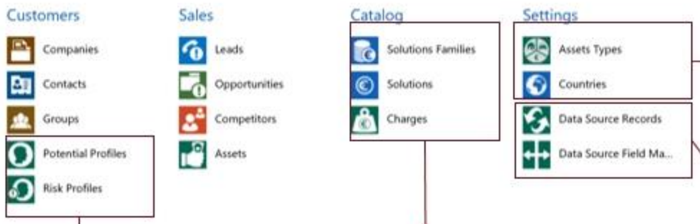
NEREA

A CUSTOMIZABLE AND FLEXIBLE SOLUTION



Asset Types & Countries are Configurable tables

Create your own solutions Catalog with corresponding charges(*)

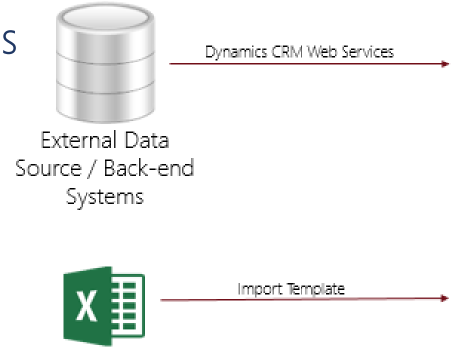
The Data Connector allows you to easily bring your back-end data into the CRM

Setup Profiles to fit your own vision of the business

EASILY CONNECT YOUR BACK-END SYSTEMS AND LET WEALTH+ SHOW THE DATA!

- Connect your data sources through web services
- Inject your data sources through a template provided with the solution

(*) Insert the record into the system if it does not exist yet. Update it if the records already exists.



- Define your own fields mappings with your own logic
- Feed the system when you want (manually or scheduled)
- Add your custom fields
- Easily manage errors

UPSERT(*)

SOLUTIONS LAYERS

Dynamics CRM

Wealth+ Core Pack

Wealth+ Setup

Specific Customs

Dynamics CRM: CRM 2016 On-Premise or Dynamics 365 Online installation

Wealth+ Core Pack: Dynamics CRM Solution that includes Pipeline Management, KYC, Data Connector, Group View, Potential Profiles

Wealth+ Setup: NEREA service (included in the licence) : Software configuration, one Import, Setup, Trainings

Specific Customs: NEREA service (Request Proposal): Any specific customisations or developments **on top** of the solution*

(*) Wealth+ solution is Managed and cannot be changed for a specific customer, even by NEREA teams. Any customisation must be done in a separate solution and must respect the customisations guidelines.

Contact your sales for a quoting !

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