NexJ CRM for Wealth Management

NexJ CRM for Wealth Management is the only Customer Relationship Management (CRM) product in the market purpose built for the wealth management industry. It has intelligence built-in, and integrates client profile, interaction, and transaction information into a comprehensive customer view. It delivers intelligent functionality for wealth management firms such as flexible householding to model complex relationships and ad-hoc groups, and rollup of account information along defined hierarchies. Wealth management firms use NexJ CRM to attract new clients, reduce churn, modernize the sales and service model, and help you meet regulatory requirements.

While delivering superior performance and usability, our CRM for Wealth Management product was built to address the integration challenges, inflating costs, and limited functionality faced by other CRM options currently on the market. By offering a CRM product that supplies the real-time data required by firms, we deliver a superior user experience, drive high user adoption rates, and provide a competitive total cost of ownership.

Our CRM displays a client-centric view of front, middle, and back-office information and applications in a single, seamless interface. It combines this information with best-of-breed CRM functionality and client-centric workflows and presents it to users as one application. We provide the capabilities for organizations to leverage data and applications to drive proactive interactions, superior client service, and regulatory compliance.

By integrating AI-powered business processes with CRM tools and client data stored in back-office systems, firms can address key processes across the entire client lifecycle. Using NexJ, wealth management firms can standardize and streamline client engagement and regulatory processes such as KYC and Portfolio Reviews, AML Checks, and Account Maintenance. Dynamic SmartForms, workflows, and approval processes guide advisors to collect required data. NexJ then generates forms, launches a process to obtain the necessary approvals, and prompts users for action to ensure an accurate and efficient experience for all stakeholders.

Key Benefits

Grow assets under management

by becoming a trusted advisor through a better understanding of client and household needs and life events

Provide personalized service

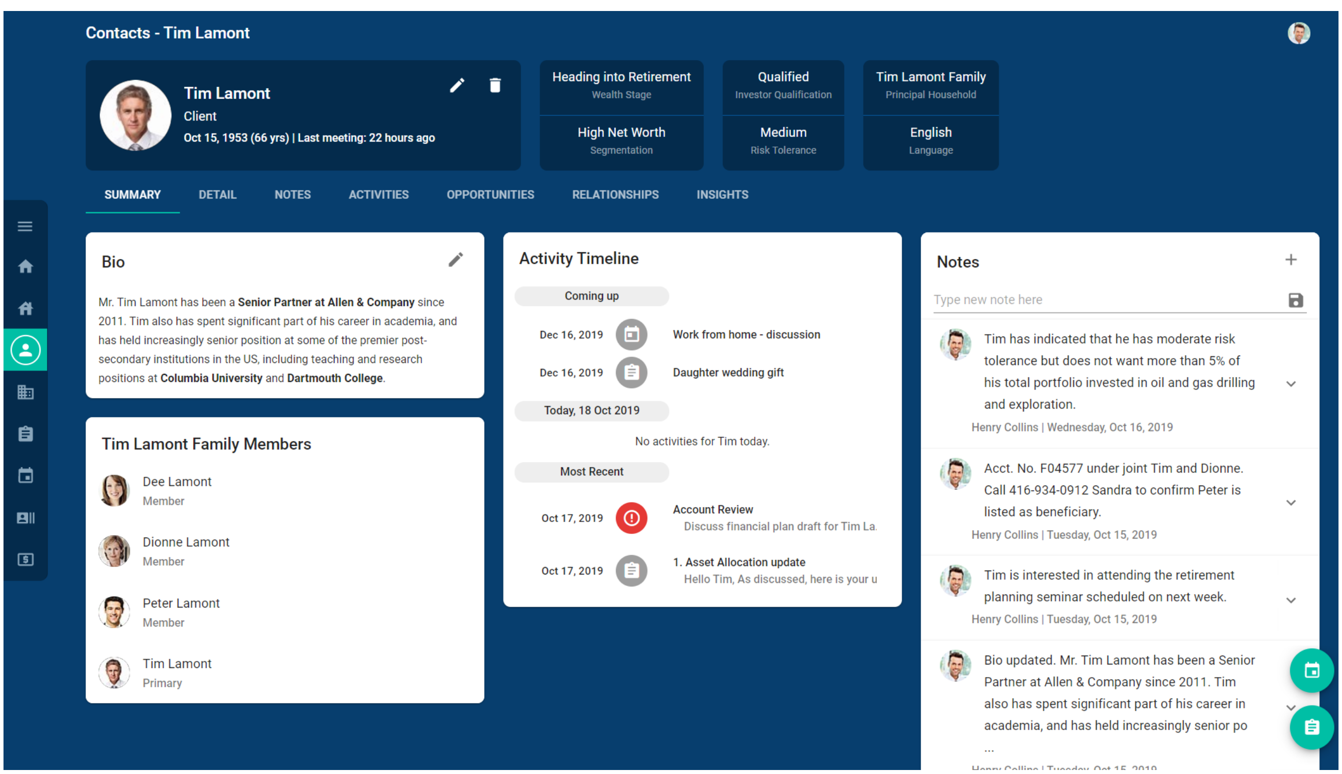
by building deep, consultative relationships and reaching out to clients with the right interaction at the right time

Optimize processes

to allow advisors to focus on selling to and servicing clients while meeting regulatory obligations

Attract and retain top talent

through an integrated desktop and automated workflows that seamlessly integrate existing information and tools, helping advisors save time and make more money



NexJ CRM for Wealth Management is an Intelligent Customer Management (ICM) product that provides best-of-breed CRM functionality tailored for Wealth Management.

> ***"NexJ is an industry leader for its implementation and application of AI (i.e., NLG, chatbots, etc.) across its platform, as well as its digital engagement features, including NexJ Insights."****
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> \- Celent Report
>
> XCELENT Awards 2018, Ranking the CRM Technology Vendors for Wealth Management

* One product name has changed and has been removed from the original quotation.

Comprehensive Customer View

Designed to help consolidate all key information from data sources across your firm, our Comprehensive Customer View equips your advisors with the most informative, insightful and up-to-date information.

Householding

Built to help establish and maintain householding for multiple clients living at the same address, and manage relationships for multiple clients living at different addresses, our CRM for Wealth Management product provides flexible householding functionality to facilitate policy/account aggregation and the modeling of complex relationships. This includes referrals, family relationships, related parties, companies, and ad-hoc relationships such as associations, or professional affiliations.

Account Aggregation & Roll Up

Roll up financial data to the client, household, and extended household levels to visualize asset class allocation, risk exposure, and holding correlations at each level. Identify exposure to a specific asset class or security for an individual or an entire household or track securities held elsewhere.

Automated Mail Merge & Form Fill

Create personalized emails, letters, and brochures or populate forms instantly with all pertinent client information. Save versions to the client record and e-mail directly from the application.

Lead Management

Built to maximize the leads and referral opportunities you receive, our lead management capability can identify the value of each lead, drive efficiencies in the sales process, and leverage your existing client base for cross-product referrals.

NexJ Insights

An add-on module designed to provide advisors with opportunities for interactions to promote retention and advocacy, our Insights product module is a built-in digital engagement service. It pulls relevant digital content from more than 10,000 third party publishers and filters it prior to distribution to ensure it complies with financial services regulations.

Microsoft Outlook Integration

An add-on module that automatically synchronizes tasks, contacts, and calendar items between Microsoft Outlook and NexJ CRM and Exchange-enabled mobile devices. Access detailed contact information directly from Outlook so advisors always have the information they need to communicate effectively with their clients and prospects.

Client Onboarding

An add-on module that streamlines and automates client-facing processes like client onboarding with dynamically branching SmartForms that streamline data collection, generate all necessary forms, trigger crossfunctional workflows, and prompt for action to increase the speed, accuracy, and consistency of client-centric processes.

NexJ Nudge™

An add-on module developed to provide advisors with data-driven recommendations to help increase their customer's assets under management, NexJ Nudge™ functionality can help advisors deliver the best service and improve client outcomes – in real time. This feature generates and ranks actions, which are then presented to the advisor to help them to carry them out.

To learn more, visit **www.nexj.com** or email **info@nexj.com**

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About NexJ Systems

NexJ Systems is the pioneer of Intelligent Customer Management. Our award-winning CRM is designed to help Wealth Management, Private Banking, Corporate and Commercial Banking, and Insurance firms revolutionize their business. Powered by artificial intelligence, our products help drive productivity, boost client engagement, and increase revenue. With users in over 60 countries, our customers benefit from our deep expertise across financial services verticals, strategic investment in innovation, and commitment to their success.