NexJ Comprehensive Customer View

All of Your Client Information in a 360^0 View

In today's digital age, information is the newest currency. With the ever-increasing amounts of information available about your clients, it is becoming more critical to have a single, centralized source for all of this information. Without that single source, you never know when you may be missing information, working with old information, or when new information is available.

Wealth Management firms need a complete understanding of each client across all regions and channels to satisfy all stakeholder expectations. The NexJ Comprehensive Customer View is uniquely able to address this need. The Comprehensive Customer View integrates demographic, transaction, interaction, and social data into a common view and models complex relationships and households so that you can better understand your clients.

By integrating all of your existing internal and external data sources with NexJ CRM, your company can ensure that advisors always have the most up-to-date information at their fingertips - no more toggling or collating data. This reduces administrative tasks and operational costs by enhancing productivity and efficiency, and allows advisors to get more out of the system than they put into it.

Modelling client relationships through householding also provides advisors with a better understanding of not only their individual clients, but also all members of a client's household across generations. This is especially important for wealth management firms, where establishing a good relationship with an heir can help keep assets with the firm after a transfer of wealth.

Householding allows advisors to aggregate data in the Comprehensive Customer View, or drill into specific client details, so they can have a complete understanding of the client's needs and value. Interactions and account information are also aggregated, offering advisors access to any information they need.

With the Comprehensive Customer View, advisors can truly understand their client's needs, relationships, goals, and interests, allowing them to offer the personalized service that clients expect.

Key Benefits

Drive Referrals and Opportunities

allowing you to increase the number of proposals and close deals.

Support Business Growth

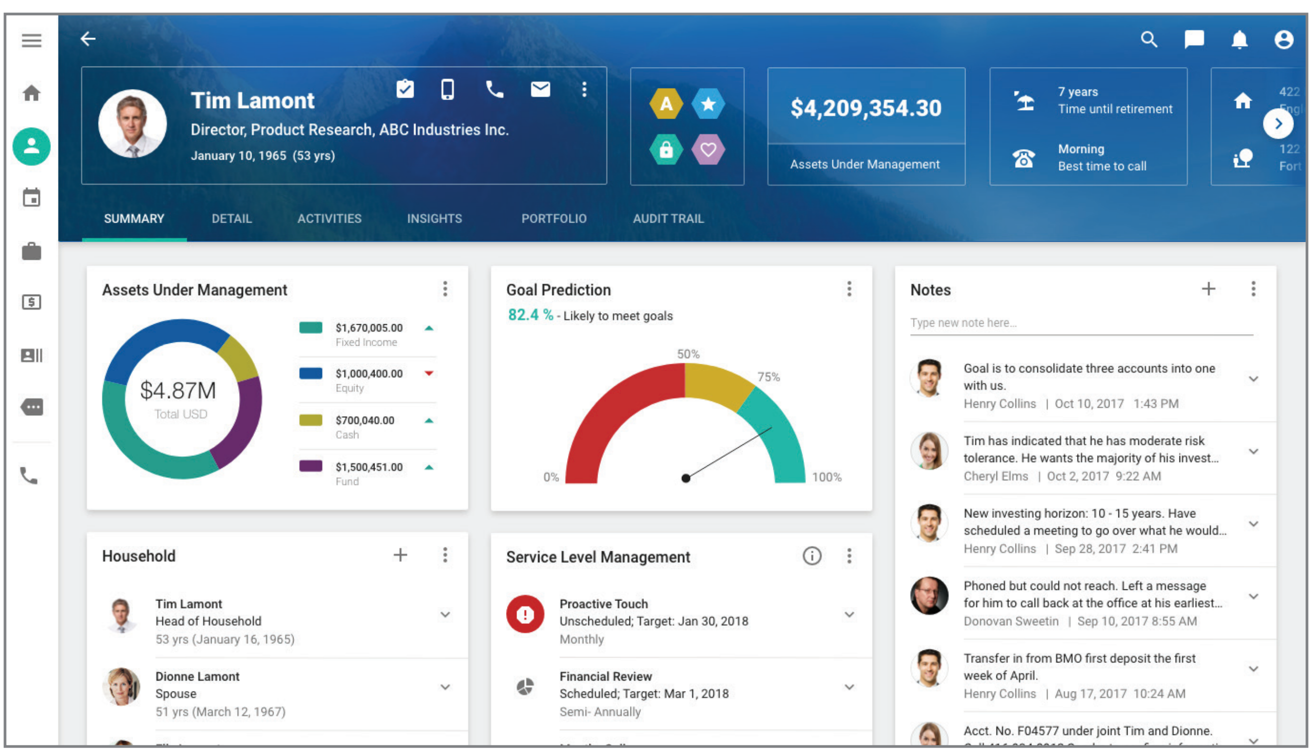
by driving client loyalty.

Enhance Your Clients' Experience

by providing advisors with insightful information.

Improve the User Experience

by providing all relevant information about clients in a single, centralized location.



Our Comprehensive Customer View provides advisors with a 360° view of their contacts, in an easy-to-view and navigable format. This is exposed through our Integrated Desktop, which delivers a comprehensive view of front, middle, and back-office information. To present this information to advisors as a single application, this information is combined with CRM functionality and workflows in a flexible portal container with seamless context passing. In sum, you can quickly and effectively leverage company data and applications to better understand, sell to and service your clients.

By consolidating information across firm-wide sources, it allows advisors to create a single point of truth that is shared by everyone. Key data points include profile information, demographic information, activities, and related account information.

Key Features to Drive Results

- **Integrated Advisor Desktop:** You can integrate back office systems and advisor applications into an Integrated Advisor Desktop. This dramatically reduces the amount of time advisors spend on double entry, manually collating data from multiple applications, and filling out forms.
- **Relationship Hierarchy:** This feature models households and extended households. It can aggregate and roll up account and interaction information along hierarchies.
- **Interaction Journal:** Our Interaction Journal logs all customer interactions, including meetings, communications, events, etc.
- **Quick Notes:** This feature allows advisros to capture and view notes about the client.
- **Data and System Integration:** This integration with internal systems and external data feeds ensures that you have comprehensive view of your customers.
- **Custom Fields and Categories:** This feature allows advisors to collect extended profile information and enables advisors to effectively segment contacts based on type, interests, or other criteria for sales, marketing, and reporting purposes.
- **Client Insights:** Insights from other systems can be viewed in the Comprehensive Customer View. This includes buying history, trading volumes, credit limits, revenue, holdings, assets under management, interests, and research subscriptions.

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

NexJ Systems Inc.
10 York Mills Road, Suite 700,
Toronto, Ontario M2P 2G4
P: 416 222 5611 F: 416 222 8623
info@nexj.com www.nexj.com

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.