Wealth Management

Intelligent Customer Management

Your competition is embracing the benefits of Artificial Intelligence (AI). What about your advisors? How can you ensure your advisors are as smart as they can be? Wealth management firms have numerous reasons to adopt intelligence into their client management strategies, such as:

- Identify & suggest next best interactions proven to grow assets under management
- Promote a collaborative client experience to engage the client as a partner
- Meet regulatory requirements with guided form fill and dynamically branching workflows
- Attract & retain top talent with modern, digital tools

With NexJ Intelligent Customer Management, wealth management firms can use AI to modernize the sales and service model by integrating, analyzing, and delivering client and prospect information to machine learning to better understand their buying journey. Firms can also use AI to increase their understanding of each client and deliver highly personalized experiences that increase loyalty and assets under management.

With process automation for basic tasks, AI-powered workflows that embed best practices into user procedures, and the delivery of client insights and next best actions surfaced in NexJ CRM, users can focus less on administration and planning, and more on sales and service. This provides productivity improvements, reduces operational costs, and increases assets under management.

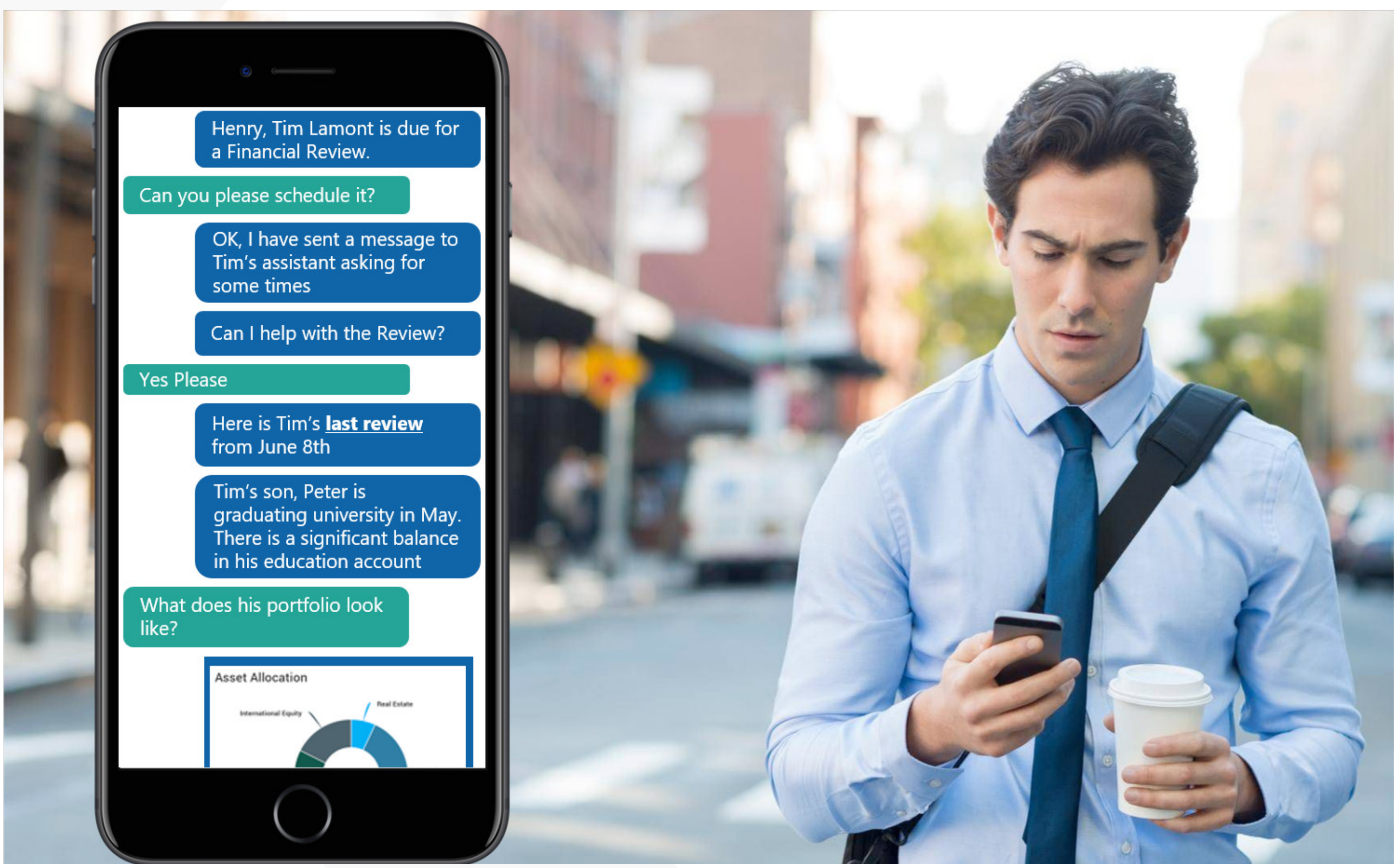
Firms who have adopted AI in their client management have seen productivity, process, and client service improvements. Firms that delay the introduction of intelligence into their client-facing activities are in danger of falling dramatically behind the competition for share of client wallet.

"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 Publish and NexJ Insights."

- Celent Report

XCELENT Awards 2018, Ranking the CRM Technology Vendors for Wealth Management

NexJ Intelligent Agent



Intelligence Built-In:

The following are examples of NexJ's intelligent features:

NexJ Leads Management
Improve lead matching, scoring, and routing with sophisticated rules that match leads, continuously assess their value, and distribute them to the right person. This helps identify duplicates, increase conversion rates, guide selling best practices, and manage complex requirements. By using NexJ's configurable Rules Engine to automatically apply business rules, firms can make it easier for advisors to convert leads, increasing user adoption.

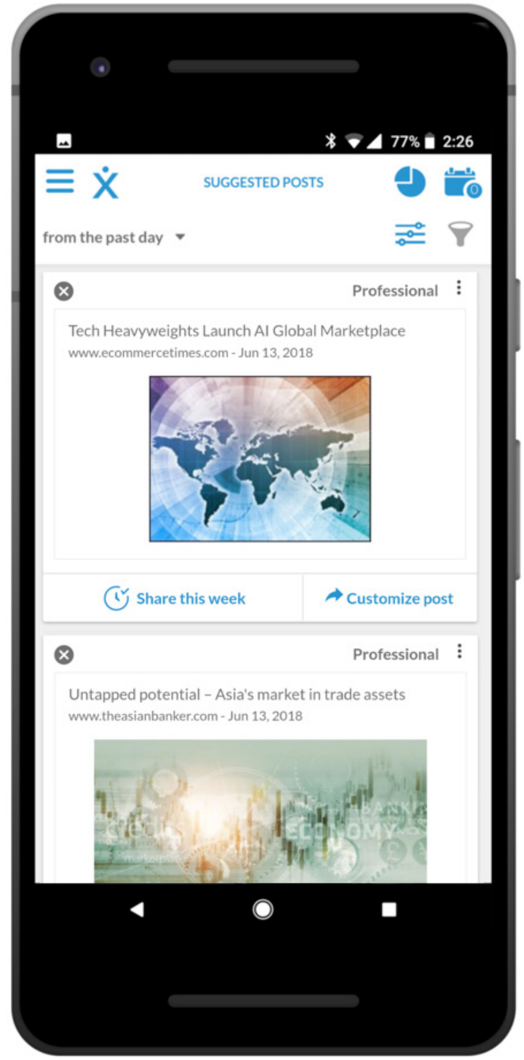
NexJ Insights
Personalize proactive non-financial interactions, using AI to curate engaging content based on the client's interests and integrated data profile. NexJ prompts advisors to send relevant news and research to clients and prospects.

NexJ Publish
Enable advisors to build a stronger brand by suggesting value-added content relevant to their expertise and client base. Advisors can schedule posts on the channel of their choice, including blog, website, email newsletter, FaceBook, Twitter, or LinkedIn, and NexJ will automatically publish them at the optimal time.

NexJ Next Best Actions
Improve customer service and loyalty by recommending the next best action for your client, based on the client's unique journey. As activities are completed, the next activity is automatically created in NexJ CRM, and assigned to the appropriate person. This ensures best practices and processes are followed.

NexJ Intelligent Agent
Allow advisors to work smarter and faster by having NexJ's chatbots take care of simple yet time consuming tasks. Chatbots can search and display clients, events, or research; build lists; schedule meetings; or suggest news and research materials for an opportunity. For example, users can request a meeting verbally or through chat, and the chatbot will find the best available time, schedule the meeting, and send invitations to attendees.

NexJ Publish



NexJ Cognitive App for Wealth Management

Through the combination of the embedded intelligence in NexJ CRM and CPM, NexJ's cognitive services, and machine learning through NexJ CDAi, NexJ provides a Cognitive App for Wealth Management.

NexJ's Cognitive App for Wealth Management recommends the right interactions at the right time, increases assets under management, and uses cognitive services to drive the efficiency and effectiveness of those interactions. NexJ's cognitive app is a continuously learning app that consists of NexJ's award-winning CRM, CPM, and CDAi.

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About NexJ Systems

NexJ Systems is a provider of Intelligent Customer Management software for the financial services industry. The Intelligent Customer Management suite is comprised of NexJ's award winning-products that use artificial intelligence to optimize customer management and increase advisor productivity, and cognitive applications that use machine learning to recommend the right actions to work smarter and faster.