NexJ CRM for Wealth Management

NexJ Systems provides CRM tailored for wealth management that helps firms to better understand clients and improve collaboration to strengthen relationships and drive revenues.

NexJ Customer Relationship Management (CRM) 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 better understand, sell to, and service clients, and to attract and retain top talent.

NexJ CRM delivers 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. With NexJ CRM, organizations can leverage enterprise 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 smart forms, workflow, 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.

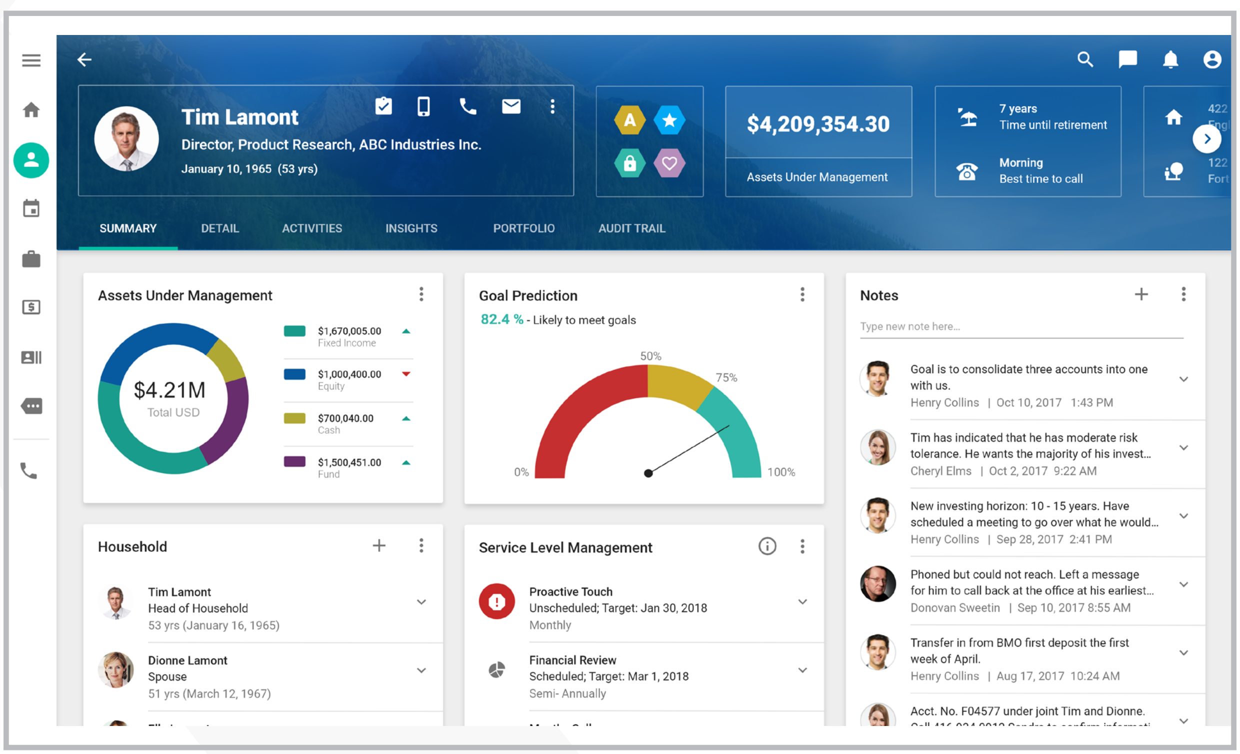
Key Benefits

Grow assets under management by becoming a trusted advisor through a better understanding of client and household needs and life events

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

Streamline client workflows 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



Implemented by **4 of the top 7** global wealth management firms

Winner of **Celent's XCelent award for Breadth of Functionality**: CRM Technology Vendors for Wealth Management

Recognized as **Best-in-Class for Workflow Management and Advisor Experience** by CEB TowerGroup

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

Flexible Client Profiles

Capture detailed client profile information with categories and custom fields to enable more discrete client segmentation and allow for more targeted cross-sell and up-sell campaigns.

Household & Relationship Modeling

Model client-centric relationships across households, corporations, and spheres of influence to understand which clients influence each other and drive high-quality referrals.

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.

Client Loyalty

Ensure advisors comply with best practices and meet commitments to firm and branch-defined service models. Tailor service levels based on client tier, profile, interests and holdings. Automatically schedule tasks and interactions and show status in analytic dashboards.

Next Best Actions

Improve client 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 Insights

Provide advisors with insights using AI to help them understand their customers and close opportunities. Additionally, personalize proactive non-financial interactions to curate engaging content and prompt advisors to send relevant news and research to clients and leads.

Integrated Search

Search across all integrated client data, including profile and asset information to quickly find the contacts you need. Save and share queries at the enterprise, branch, or group levels.

Automated Mail Merge & Form Fill

Create personalized e-mails, 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.

Microsoft Outlook Integration

Automatically synchronize tasks, contacts, 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 Workflows

Streamline and automate client-facing processes like client onboarding and KYC with dynamically branching smart forms that streamline data collection, generate all necessary forms, trigger cross-functional workflows, and prompt for action to increase the speed, accuracy, and consistency of client-centric processes.

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.

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