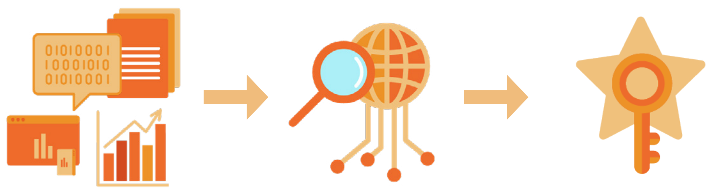
squirro

# Wealth Management Solution

## Enhance the client acquisition and retention, and unearth portfolio allocation opportunities through Augmented Intelligence

It's an on-going challenge for financial advisors to grow their client base, improve client retention, and increase profitability. To do so, financial advisors must make the best use of the assets at their disposal – this means deriving insight from all their data, including unstructured data, using augmented intelligence.

### HOW IT WORKS



**GATHER**
various data sources in one dashboard

**UNDERSTAND**
your business needs and extract key insights

**ACT**
on opportunities that emerge in real-time

### SOURCES

- CRM meeting notes
- Emails and call transcripts
- Newsfeeds
- Premium financial data
- Stock market fluctuations
- Changes in existing portfolio
- Company planning to raise capital
- Management changes in a company

### WHAT'S IN IT FOR YOU

- Source better investment opportunities
- Increase assets under management
- Stay on top of all industry developments
- Deepen client relationships with insights
- Improved client loyalty, reduced churn

### HIGHLIGHTS

- Deal origination
- Counterparty recommendations
- Relationship map
- Pitch insights
- 360° client cockpit

### BENEFITS

- Improve profitability and efficiency
- Increase revenue and uncover hidden deals
- Strengthen client relationships
- Get quicker client and market insights
- Reduce time to analyze data

### ACHIEVEMENTS

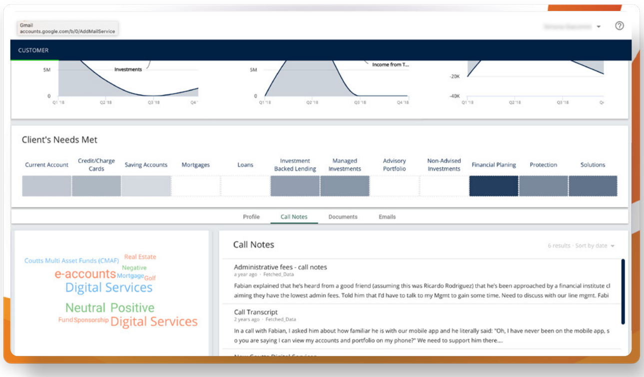
- 6-month early notice on potential deals
- >50 deals uncovered in first 30 days
- >90% accuracy
- Improved ROI on premium data
- Increased adoption rate of CRM system

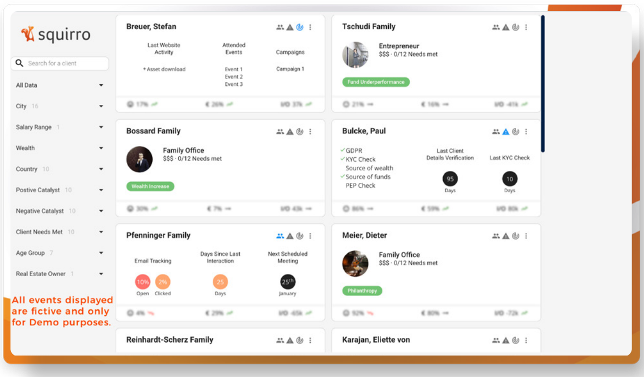
EXPLORE

# Augmented Intelligence for Wealth Management

## 1 BOOST LEAD GENERATION AND SOURCE INVESTMENT OPPORTUNITIES

Financial advisors need to approach high-net-worth and ultra-high-net-worth prospects as early as they can. Squirro works with a huge range of data sources, giving advisors notifications of any event or catalyst that could result in an opportunity as soon as it takes place. This allows Relationship Managers to approach prospects with highly relevant and timely investment opportunities at the right time.



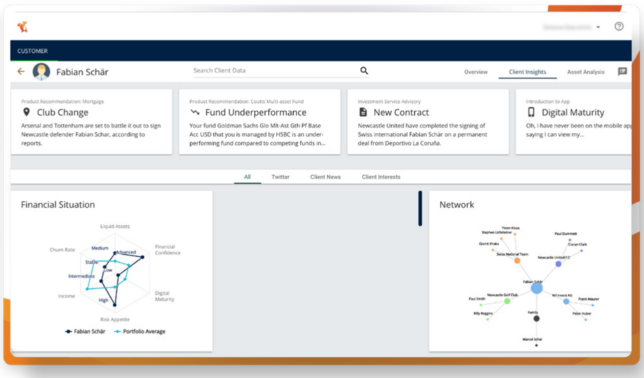




## 2 IMPROVE CLIENT PROSPECTING, ACQUISITION, AND RETENTION

Wealth management still relies heavily on trust between a financial advisor and their clients. Our solution helps you to maintain a strong relationship and avoid churn by letting users understand clients better through data-driven insights derived from all the data. This includes client relationship network mappings, which help you to understand the client's network better and ask for introductions.

## 3 DELIVER A FIRST-CLASS CLIENT EXPERIENCE

By tracking any deals or investment opportunities across such a wide range of data sources, the Squirro Wealth Management app delivers a first-class client experience. The Squirro Client Advisor Dashboard takes that even further, offering a holistic 360° view of every client and providing financial advisors with deep and accurate insight into each client's activity.




OUR COSTUMERS

# Data-driven financial institutions

Standard Chartered · BANK OF ENGLAND · ING · BROOKSON · Ninety One · CANDRIAM A NEW YORK LIFE INVESTMENTS COMPANY

### ABOUT SQUIRRO

Businesses capitalize on new opportunities, improve client relations, and optimize decision-making capabilities using Squirro's vertical-specific Augmented Intelligence solutions, which combine human intelligence with powerful AI. An Insights Engine at its core, Squirro delivers contextualized insights from your most relevant data sources and displays them directly, via workbench integrations, or through self-service applications.

Squirro works with global organizations, primarily in the Financial Services, Insurance, Telecommunications, and Manufacturing industries. Customers include Bank of England, Standard Chartered, ING, Brookson, and Ninety-One. Founded in 2012, Squirro is currently present in Zürich, London, Munich, New York, and Singapore. Further information about AI-driven business insights can be found at **squirro.com**

Zürich, London, Munich, New York, and Singapore | **contact@squirro.com**

### LEARN MORE ABOUT WEALTH MANAGEMENT SOLUTION!