



## A best of breed ecosystem

Overcoming the challenges of a component based tech model





# Jelly Spogs, Liquorice Squares & Coconut Rolls

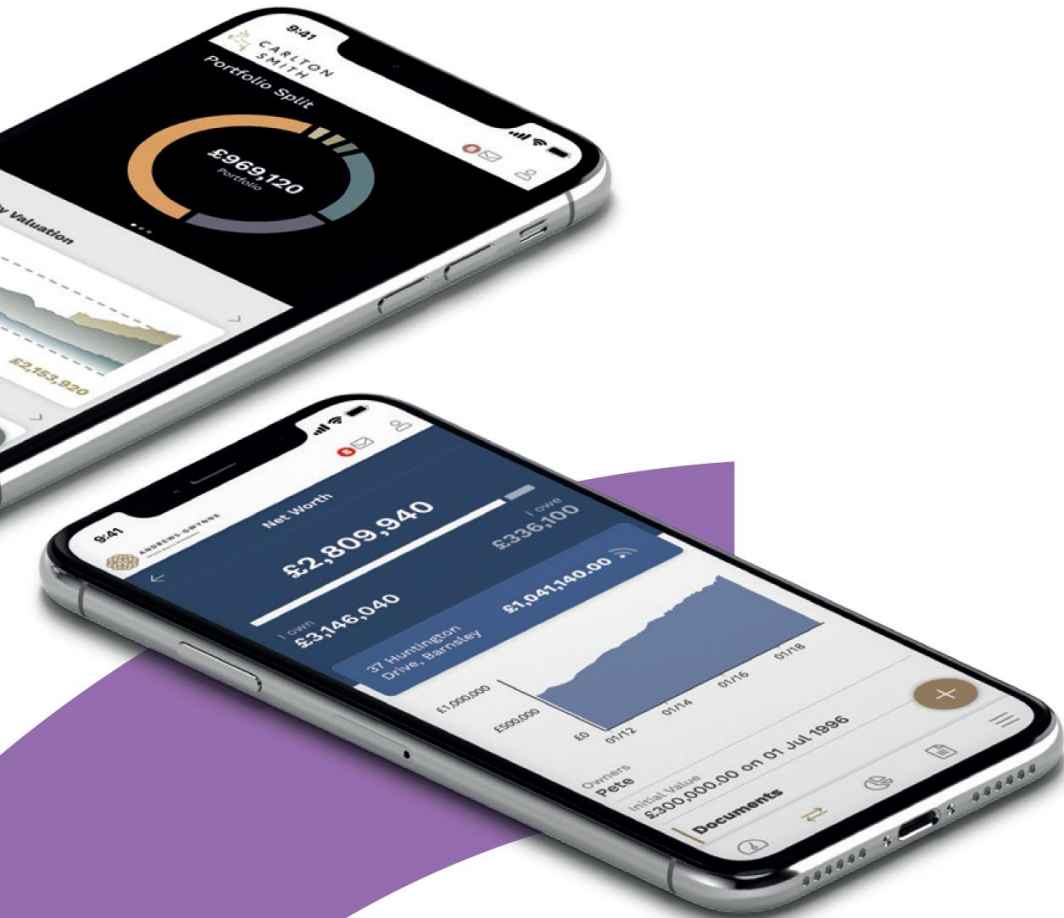
## **Understanding and transforming complex data from a variety of sources**

A case study for a new digital channel for an independent wealth manager





# Testing...testing...testing



- Analyse
- Understand
- Test your assumptions
- Test them again

 It doesn't stop once you go live!



# It's not just about the tech

It takes talent and technology to deliver  
an innovative digital proposition

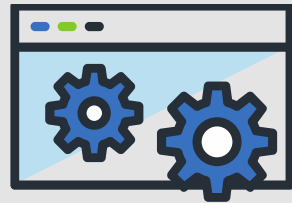


# The opportunity



## On-Board

- Integrated workflow
- eSignatures for client agreements
- Share key documents
- Keep clients informed



## Automate

- 24/7 valuations
- Remove paper
- Automate MIFID reports
- Full audit trail
- Track client engagement
- Save time and cost



## Protect

- Stop sending client comms via email
- GDPR best practice



## Enhance

- Under your brand
- Make it mobile, make it easy
- With your clients in the moments that matter



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