



Wealth Management

Delight customers with impeccable client service.

Reduce costs with intelligent automation.

Automation enables wealth management firms to focus on their core business, strengthen their competitive advantage, and improve satisfaction for clients as well as wealth managers and staff. Eliminate workforce inefficiencies with:

- Positive customer experience.
- Enhanced productivity.
- Lower operational costs.
- Reduced response time.
- Faster client on-boarding.

Automating time-consuming tasks and processes allows wealth managers to concentrate on value-add activities, which in turn helps drive revenue.

Build trust and gain client confidence.

Customer experience in wealth management is essential because the relationship has far-reaching implications on the client's financial and life goals. A dedication to delighting clients through impeccable experience is a key component in building trust and gaining client confidence. Today's technically savvy clients are more open to switching to other wealth management providers in search of better user experience, forcing firms to innovate

to keep up with rising demands. Advisors must be flexible enough to meet the needs of clients across generations, both by reskilling their advisory workforce and adapting their offerings and service.

Approach compliance holistically.

Wealth managers need visibility on processes, data, and KPIs to ensure compliance in the face of new regulations or changing business needs. They need a simplified way to manage the process of evaluation of all new changes in regulation. Intelligent automation can reduce redundancy in data, create greater transparency, execution control, and accountability to improve compliance capabilities and create business opportunity, efficiently.

Wealth managers can improve compliance cost-efficiency and further customer relationships through greater execution control and accountability, at lower costs by adopting robotic process automation (RPA) technology and integrating it with business process management (BPM) capabilities.

Appian helps wealth managers deliver exceptional customer experience for a sustainable competitive advantage.

Appian wealth management customers can:

- Reduce service times.
- Deliver a seamless omni-channel experience.
- Provide holistic client lifecycle management.

The Appian difference for wealth management.

- **Deepen client relationships.** Empower your relationship managers to better serve your clients through greater visibility, across all channels.
- **Engage your customers with client-focused onboarding.** Increase the lifetime value of your clients through a simplified on-boarding process.
- **Continuously improve compliance and risk management.** Gain control through increased visibility and empower your people to take action in the moment.
- **Speed time to revenue.** Unlock the potential of your employees with technology that allows them to do their work in an effective and controlled way..

Explore the Appian suite of applications for wealth management.

New Business	Customer Service	Capital Markets Operations	Corporate Functions	Governance, Risk and Compliance
<ul style="list-style-type: none"> • Deal initiation and review • Product launch management • Product hub 360 	<ul style="list-style-type: none"> • Customer transaction lifecycle management • Customer onboarding coordination • Customer reporting oversight 	<ul style="list-style-type: none"> • Corporate actions • Legal entity lifecycle management • Investment operations help desk • NAV oversight and control 	<ul style="list-style-type: none"> • Financial accounting processes including month-end, quarterly, annual close • HR management • Internal audit • Legal management • Enterprise risk response and investigations 	<ul style="list-style-type: none"> • Political contribution surveillance • Service provider oversight and control • GDPR • AML • FATCA • Fraud • MiFIDII • CIP/KYC/enhanced due diligence • Regulatory monitoring and action

Leaders in financial services trust Appian.



Learn more about appian's capabilities for wealth management: appian.com/finserv.



Global HNWI (high net worth individual) wealth has been growing for 6 consecutive years, and now surpasses US\$70 trillion for the first time.

Capgemini World
Wealth Report, 2018

appian

Appian is the unified platform for change. We accelerate customers' businesses by discovering, designing, and automating their most important processes. The Appian Low-Code Platform combines the key capabilities needed to get work done faster, Process Mining + Workflow + Automation, in a unified low-code platform. Appian is open, enterprise-grade, and trusted by industry leaders. For more information, visit appian.com/finserv.