



## **Sindex expands its service offerings to meet the growing demand from Wealth Management**

### About Our Wealth Management Practice

Wealth Management firms are faced with increasing demands for transparency and superior customer service as well as the need to cater to a more geographically diverse and technically sophisticated customer base. Competition is increasing as the industry is going through a business process and technology shift to satisfy, retain and attract clients.

Sindex Financial Systems offers insight and domain expertise to streamline business processes and build a technology platform to support growth. Sindex works with companies to provide a future roadmap, capture business requirements and implement or customize technology solutions. We have designed targeted offerings to address the needs of the Wealth Management Industry.

**Advisor Solutions:** Advisors require tools necessary for efficient and cost-effective relationship management so their time is spent with the client, not on administrative tasks. As clients demands increase, internal process alignment and technology integration are imperative. Integrating client account information, cash and transaction data and performance data will enable a 360 degree view of the account and ensure timely customer service.

**Client On Boarding and New Account Workflow:** The process of converting a prospect to a client is often complex, requiring participation from several departments. Companies gain efficiencies by streamlining forms processing and document storage, standardizing client data capture and workflow authorization and automation.

**Portfolio Management/OMS Product Implementation:** Vendor products continue to evolve to meet the demands of the industry. Today's solutions need to allow portfolio managers to easily customize a client's account based on unique objectives, preferences and tax implications. Implementing the right solution saves significant time and cost for structuring and rebalancing accounts, provides what if analysis and advanced modeling capabilities, and integrates compliance engines to meet increasing compliance and regulatory requirements.

**Performance Reporting and Attribution Analysis:** Advanced analytics and reporting is becoming a differentiating factor. A central point of access for GIPS compliance, performance reporting and flexible attribution and composite analysis provides all levels of users' important information on client accounts. Flexible and secure client reporting and tools enables "self servicing" options for tech savvy clients.

Sindex continues to bridge the gap between business needs and technology solutions. If you would like further information on our Wealth Management Offerings please contact: [info@sindexsystems.com](mailto:info@sindexsystems.com)