Wealth Management System (WMS)

Excel Wealth Management System (WMS) provides finance organisations with an integrated, comprehensive and functional software in managing customer relationship, conducting financial planning and tracking investment portfolio.

The All-in-One Wealth Management Software

The Excel WMS is not just a financial planner, it has all the components (including a financial planner) you need in one package to support your wealth management activities such as customer profiling, risk tolerance analysis, investment planning and portfolio tracking.

In general the goals of a wealth management business are mainly in two areas: developing a customer base of the mass affluent and selling of investment products. Excel's WMS gives you the tools to build up this new customer base through campaign and leads management functions, and to sell them various investment products through a structured approach of financing planning and need analysis.
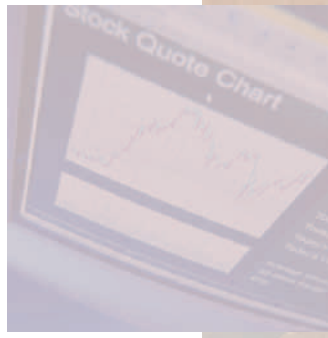
Integrated

Comprehensive

Feature-rich Solution

CRM Integration

Wealth management system has to work with your customer relationship management (CRM) system to make the best use of customer and prospect information available. Excel's WMS allows name lists generated by your CRM system or other systems to be imported for prospecting and marketing work. Activity results can also be fed back to your CRM database for further analysis.

Handling the Mass Affluent and the Very Rich

The wealth management service to be rendered to your customers can vary considerably. Young professionals may only want advice on investment products and order execution, while the very rich may want very personal private-banking like services. WMS provides functions to support all these different modes of customer service.

Step-by-Step Approach to Wealth Management

Not all customers are ready for a full fledge financial planning exercise, therefore, WMS can be used to market specific investment products to addressing different needs over a period of time. WMS keeps a clear tab of all investments made, together with a full set of history of services rendered, for each customer.
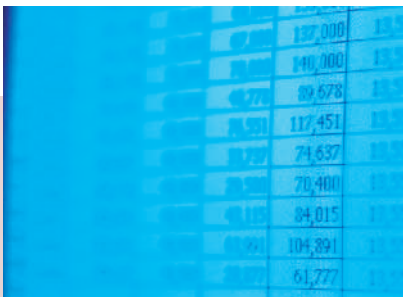
Wealth Management System

The All-in-1 Desktop

This Desktop is a screen of functions specially tailored for customer service staff engaged in wealth management. It consists of a number of customer service functions such as call list, service log, calendars, alerts, response capture etc. which will greatly enhance productivity of the staff.

Financial Planner

For the customers who are seriously about financial planning, the WMS financial planner can be used to step through the various key steps such as cashflow analysis, asset and liability tracking, needs analysis and detailed investment planning.

Leads & Campaign Management

Lists of prospects, from your CRM system or any outside sources, can be imported, filtered, distributed and tracked under the various leads and campaign management functions.

Customer Profiling

You can profile your customer from the responses captured on various sales campaign over time. You can further understand their investment preferences by walking them through risk tolerance assessment questionnaires with questions of your own choice.

Portfolio Tracking

With appropriate price feed, WMS can calculate the market value of customers' investment portfolios. Profit and loss measurements can also be tracked on a regularly basis, say monthly, to enable you to closely monitor the performance of these portfolios and to report to the customers.

Product Information

Updating WMS with new product information, new campaign and many other parameters can be done easily without programming effort. The system is designed with high degree of user friendliness in mind.

Wealth Management System
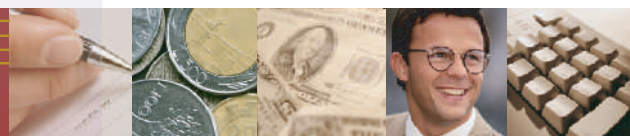
Technical Information

Web Interface

Deployment of WMS in an organization would be relatively easy even if remote locations are included. Its web based user interface allows user to log into WMS without the need to pre-install any software.

Hardware and System Software

WMS was developed using Java which is of open-architecture. Therefore, WMS can practically run on all UNIX and Microsoft Windows NT platforms.

System Interface

WMS can talk to other Excel software package to execute trading orders for stocks, ELI product, unit trust etc. It can also be made to talk to the other computer systems.

Shenzhen   Beijing   Hong Kong   Shanghai   Singapore