

CAPCO

WEALTH AND ASSET MANAGEMENT

TODAY'S MARKET

The wealth and asset management industry is going through a phase of material disruption. We are seeing a transfer of \$30 trillion in wealth from baby boomers to millennials, and advisors are moving away from full-service wealth management to independent advisor business models. These changes create an incredible opportunity for financial institutions to leverage their wealth management business as a pillar for growth. Global financial institutions are increasing their investment in the US wealth management industry, and US banks are relaunching their wealth management units. As investment increases, financial institutions are focused on creating businesses and platforms for the future, creating a massive opportunity for Capco.

SERVICES AND SOLUTIONS



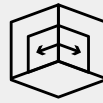
1. Strategy



2. Experience



3. Efficiency



4. Product & Platform



5. Engagement & Adoption



6. Protect

INDUSTRY AREAS

WEALTH MANAGEMENT
ASSET MANAGEMENT

INSURANCE WEALTH MANAGEMENT
RETAIL & INSTITUTIONAL TRUST

PRIVATE BANKING
REGISTERED INVESTMENT ADVISORS

WEALTH AND ASSET MANAGEMENT PRACTICE

Capco's Wealth and Asset Management practice helps clients stay ahead of industry trends by defining and delivering future business strategies. The Wealth and Asset Management practice focuses on supporting the complete consulting value chain, including:

- Driving growth strategy
- Designing the platform of the future
- Defining their product shelf and designing the advisor experience

Additionally, in light of cost pressures, Capco continues to support wealth and asset managers in optimizing operating models and service models to drive efficiency.

CLIENT SUCCESS STORY

Capco completed a minimum viable product (MVP) launch for a Global Tier 2 Commercial bank in four months

Challenge: The client wanted a single unified client and advisor platform to increase digital engagement to enhance the client experience and help drive growth within the growth strategy roadmap

Solution:

As the preferred implementation partner, Capco, helped roll out a multi-phased, multi-launch delivery schedule. Key solutions include:

- Digital portal for client and advisors – **account holdings, transactions, secure messaging, etc.**
- Portfolio construction toolkit – **custom portfolio allocations, drift analysis, etc.**
- **Digital onboarding**
- Worked in an **Agile** framework and provided **frequent communication and training**

Results:

- Rapid deployment of platform solution with continued planned released on schedule
- MVP launch within four months
- Bespoke configuration of a platform with proprietary branding and product customization
- Consolidation of advisor platform and toolkits to serve clients better
- Enhanced user experience with real-time on-demand access to wealth information

“

We are truly impressed that the team has built three portals within the four months.

”

— an executive at Global Tier 2 Commercial Bank

CONTACT

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ABOUT CAPCO

Capco is a global technology and management consultancy dedicated to the financial services industry. Our professionals combine innovative thinking with unrivalled industry knowledge to offer our clients consulting expertise, complex technology and package integration, transformation delivery, and managed services, to move their organizations forward.

Through our collaborative and efficient approach, we help our clients successfully innovate, increase revenue, manage risk and regulatory change, reduce costs, and enhance controls. We specialize primarily in banking, capital markets, wealth and asset management and insurance. We also have an energy consulting practice in the US. We serve our clients from offices in leading financial centers across the Americas, Europe, and Asia Pacific.

To learn more, visit our web site at www.capco.com, or follow us on Twitter, Facebook, YouTube, LinkedIn and Instagram.

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