CASE STUDY: WEALTH MANAGER

Supporting client acquisition through efficiencies

OPPORTUNITY

One of the world's largest multinational investment bank and financial services companies headquartered in Europe was looking to develop a standard offering for their wealth advisory clients who have increasingly asked for sustainable investment solutions. The goal was to uncover the common denominators of past ESG requests to develop a standard framework that would meet 80% of their requests.

SOLUTION

We built a seamless interface to present the data in an easy-to-use format and we are building a reporting framework that allows advisors to create an ESG performance report with a single click.

OUTCOME

The easy to use interface increased their wealth advisor's adoption of the tool and helped increased their ability to attract new clients. This enabled them to fulfill their longer-term objective of generational wealth preservation by providing product features that would appeal to the children and grandchildren of the clients.

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