

# Finacle helps a leading bank in Philippines generate new revenue streams



Discover how leveraging Finacle Wealth Management solution helped the bank transform their private banking and wealth business to achieve better results



RM dashboard offers widgets to view customers with top AUM, 360° view of customers, to-do items and assign tasks



The 360° view lets advisors view linked customers' accounts, assets & liabilities, and income & expenses



System-driven risk profiling that are validated during transactions



Generation of customer statements and operational reports



## Facts and Figures



Hierarchy maintenance ensuring organizational structure



Trade rules and validations which reduce operational risk



Interface to bank treasury and 3<sup>rd</sup> party systems



Bank can distribute "instruments issued by BSP" (Central Bank of Philippines) and local promissory notes

The Finacle Wealth Management solution offers an array of benefits such as:

### Front office benefits:

- Robust front office system that helps generate more business
- View schedules, tasks, and alerts using RM dashboard
- Automated processes that assess customers' risk-taking ability
- Consolidated Portfolio Statement

### Back office benefits:

- Uniform user experience across asset classes
- Out-of-Box interface with external and internal systems
- Reporting platform for customer statements and regulatory reporting
- Increased operational efficiency