

## Tablet based Private Wealth Management Advisory App

*Rapid adoption of smart phones and tablets require an effective response by global wealth managers. Advisors as well as clients will be hungry for the capabilities these new consumer devices provide in managing investments – Gartner*

With the advent of mobility as a disruptive technology during the past few years, it is seen that there is an increasing usage of tablets by investors to track their financial investments. As per a 2011 survey conducted by Financial Services Marketing HNW, 42% of the respondents conduct trade using their tablets.

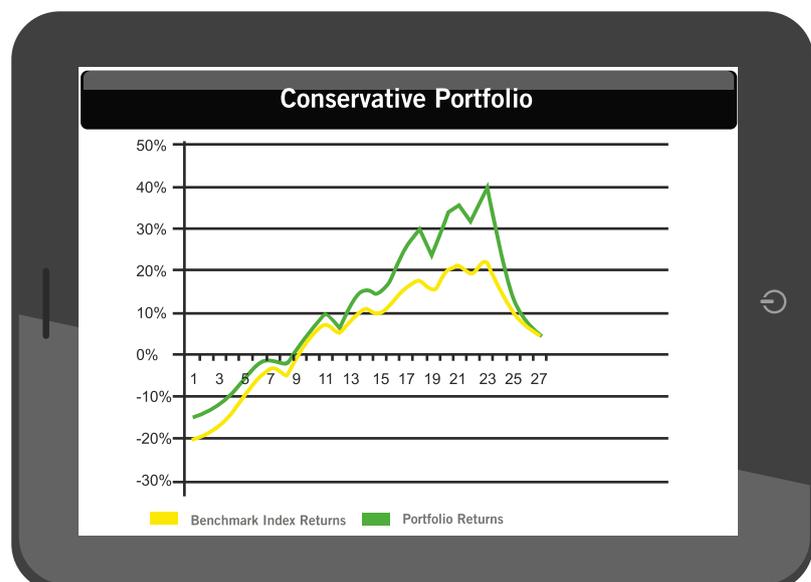
Happiest Minds Technologies has identified the role that tablets would be playing in the current business environment. The Tablet based Private Wealth Management advisory application of Happiest Minds Technologies makes the most of the iPad's hands-on interactive features. The application design features off-the shelf methodology combined with design customization that helps to blend perfectly well with the underlying Wealth Management solution of the bank.

Usage of tablets by advisors, enable their clients to have a better intuitive and richer digital interaction leading to better customer experience. The tablet based application enables to create easier navigation leading to improved browsing experience unlike the legacy desktop application. The advisory app solution also features Peer to Peer (P2P) communication that can enhance the customer experience.

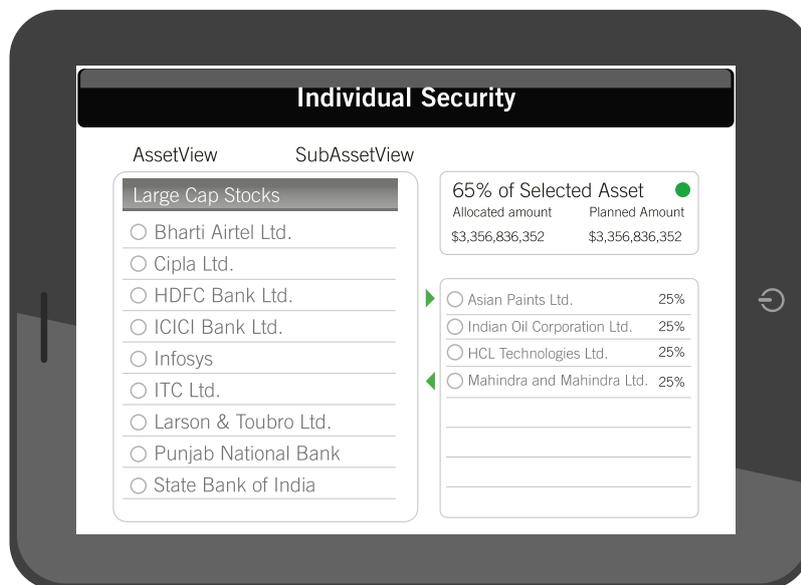
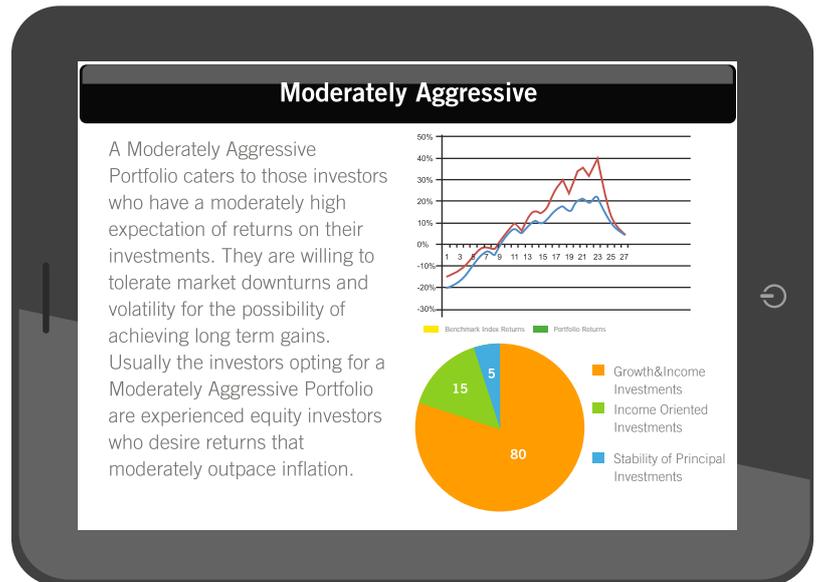
Tablets are increasingly being viewed as productivity tools. The tablet can be an agent driving automation in the middle and back offices of a bank. It can play a huge role in straight through processing (STP) of transactions with minimal manual interventions. Usage of tablets by wealth management firms in advisory services enables advisors to respond faster to client's needs by processing trade requests even when they are away from office.

The Tablet based advisory application assigns a portfolio from a list of model portfolios based on the risk profile of the investor.

The portfolio consists of various asset classes that are allotted different weightages based on the risk-averse nature of the investor and the riskiness of the financial instrument.



The risk versus return scenario for a portfolio can be viewed using risk charts that are populated along with each portfolio. The advisor can use similar graphical images to provide an enriching experience to the investor before the investor decides upon an asset class.



The Advisory Application can be augmented to include features like client confirmations on the spot using the electronic signature capabilities of tablets. Other mechanisms that could improve efficiencies of the advisory services include payment capture using card scans, cheque captures and document scans that reduce paper work.

Client experience can be enhanced by a variety of innovative features like pushing alerts and client dashboard/ Key Performance Indicators (KPI); providing advisors with client items that require high priority attention.

## About Happiest Minds Technologies:

Happiest Minds, the Mindful IT Company, applies agile methodologies to enable digital transformation for enterprises and technology providers by delivering seamless customer experience, business efficiency and actionable insights. We leverage a spectrum of disruptive technologies such as: Big Data Analytics, AI & Cognitive Computing, Internet of Things, Cloud, Security, SDN-NFV, RPA, Blockchain, etc. Positioned as "Born Digital . Born Agile", our capabilities spans across product engineering, digital business solutions, infrastructure management and security services. We deliver these services across industry sectors such as retail, consumer packaged goods, edutech, e-commerce, banking, insurance, hi-tech, engineering R&D, manufacturing, automotive and travel/transportation/hospitality.

Headquartered in Bangalore, India; Happiest Minds has operations in USA, UK, The Netherlands, Australia and Middle East.

To know more about our offerings. Please write to us at [business@happiestminds.com](mailto:business@happiestminds.com)