WealthLink Order Express (OEX)

Empower Advisors with Seamless, Compliant Onboarding and Transaction processing via WealthLink's Order Express (OEX)

Streamline investor onboarding and transaction processing with Unitrax® AG & Wealthlink OEX. Key features include multi-account setup, automated form generation, e-signature integration, and enhanced transfer automation, resulting in significant effort and cost reductions, seamlessly integrated with existing systems while ensuring compliance.

Introduction

Insurance wealth is a traditionally underserved segment with a reputation for high-touch/high-cost manual operations functions and sub-optimal client experience. Technology has a vital role to play in digitizing the advisor, client, and back-office experience. It allows the relationship to remain focused on high-value interactions rather than transactional ones while increasing processing efficiencies and reducing cost.

Business opportunity

Onboarding is the critical first stage in the customer/investor journey and sets the tone for the entire relationship with your product. A differentiated and streamlined onboarding experience allows advisors and investors to drive immediate value from your product, making them more likely to invest additional clients and increase customer loyalty.

From an administration perspective, the new application and initial purchase stage is the most labor-intensive and costly part of the client's life cycle. Empowering advisors with digital self-serve tools offers the opportunity to shift efforts from administration to higher-value activities. It also greatly reduces client acquisition costs to front, middle, and back offices.

LTIMindtree solution

The WealthLink OEX portal transforms how advisors manage the investor onboarding experience. The solutions can be integrated seamlessly into existing distributor systems and workflows and reduce considerable effort and cost. Advisors can orchestrate immediate account setup and transaction processing while adhering to compliance policies and business rules. The key highlights are:

Investor/Account Setup

- Investor, beneficiary, annuitant
- Guided workflows screens and steppers
- Multi-account setup

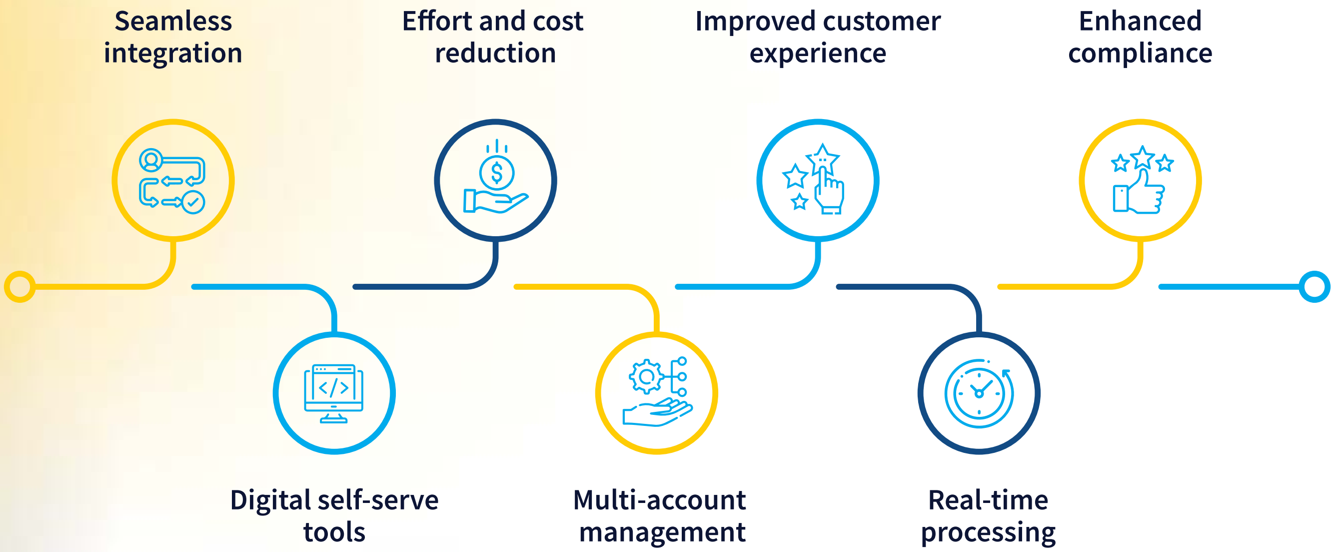
Transaction processing and account attributes

- Initial purchases
- Systematic plan setup
- Investor funding through EFT, cheque and transfer
- Enhanced Transfer Automation

Compliance

- Automated form generation and e-signature integration
- Business rule enforcement
- Workflow integration for pre-trade compliance tasks and archive

Benefits



Why LTIMindtree

Experience

25+ years in the Canadian Wealth Management space

$1+ Trillion Assets Under Administration

Client focus

170+ clients across investment and insurance wealth

Technology-first approach

Comprehensive engineering with a focus on customer experience, automation, quality, and security by design

Conclusion

Imagine an advisor recommending your product and being able to deliver immediate value for their client. A customer-centric onboarding experience differentiates you from your competitors and creates an experience that attracts and retains customers.

Ask us how prescribed workflows, real-time business rule validations, and seamless system integration can simplify the onboarding process for investors. Discover how these elements reduce administrative costs across your entire value chain.

For more information, get in touch with us at
info.canada@ltimindtree.com

Headquartered in Mississauga, Ontario, LTIMindtree Financial Services Technologies Inc. ("LTIMindtree Canada") is a wholly owned subsidiary of Larsen & Toubro Infotech, a leading global technology consulting and digital solutions company. With over two decades of rich experience, LTIMindtree Canada with its flagship product – Unitrax® – a SaaS-based transfer agency record-keeping suite, is one of the leading wealth and asset management platform in Canada, with Assets Under Administration in excess of CAD $1Tril+, enabling fund manufacturers and insurance providers to address their record-keeping needs across the product spectrum such as Mutual Funds, GICs, Hedge Funds, Alternative Investments, Institutional Funds and Insurance Wealth Products – all under one platform. LTIMindtree Canada has a deep understanding of disruptive technologies, and partners with top Canadian financial services firms to accelerate digital journeys of its clients through end-to-end consulting and implementation solutions, Smart Automation and Advanced Data Analytics, Cloud Infra & Security, Assurance Services and Business Process Management. For more information, please visit https://www.ltimindtree.com/canada/