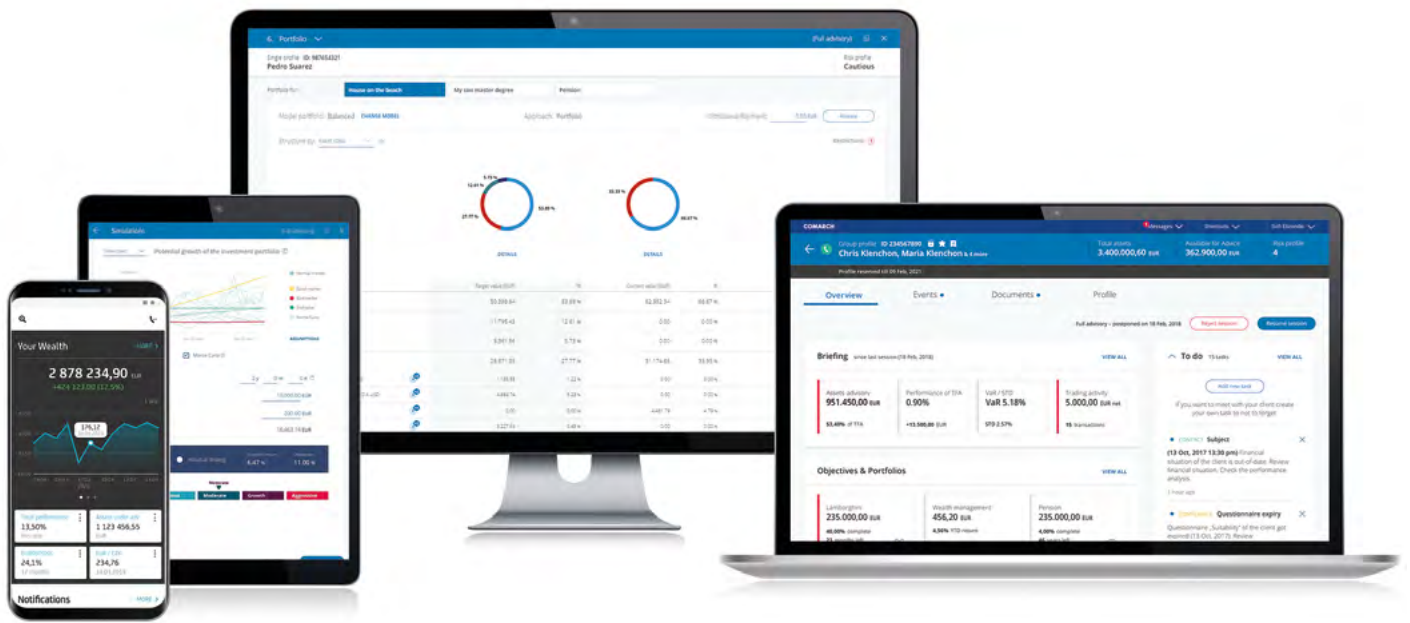


**COMARCH**

# **Comarch Wealth Management**

Build relationships that last

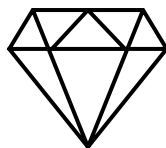


We've built our system to guide advisors and clients to the right investment decisions, step by step. No matter how many clients you have, which segment they belong to, or how experienced your advisors are, you will keep your service at the highest level.



## Retail

Education, financial soundness and regular saving



## Affluent

Long-term goals and investment opportunities



## Private banking

Advice on strategic assets allocation, custom recommendations and add-on services

## Key features

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- **Cater to them all**

The finest investment advice to all your clients, no matter who they are, and how they change.

- **Stay reachable**

You'll be much easier to get in touch with. Think client app, online meetings, shared investment ideas, and more.

- **Recommend next steps in minutes**

It only takes a glance to have a full client investment picture and that means you can give accurate recommendations within one meeting.

- **Build relationships that last**

Whatever changes your clients or the markets may experience, you will be set and ready for what's ahead. This is how relationships grow stronger.

# Problems we help fix



## ✓ We question 'one size fits all' approach and help you deliver a tailor-made service

We believe everyone deserves excellent investment advice, the one that fits best. And so, Comarch Wealth Management lets you fine-tune your recommendations to risk appetite, financial capabilities, or client needs - all based on their up-to-date financial picture. **All in a single system.**

## ✓ We turn weak employee experience into a strong one by guiding your staff on their way

We provide employees with performance and analytical tools to make their work smooth and efficient. Comarch Wealth Management prioritizes advisors' tasks and activities by consolidating and monitoring vast data sets. It also guides advisors every step of the way, minimizing the risk of human error.



## ✓ We bid farewell to shaky investment advice with tools that make it first-rate each time

Automated modules embedded in the platform amplify operational efficiency, which results in cost reduction, time savings and additional business generation. CWM's proprietary end-to-end advisory process - from client onboarding, through relationship nurturing up to reporting - will make your job much easier.



### **We make hard-to-reach advisors a thing of the past – think chat rooms or video calls**

Thanks to Comarch Wealth Management, your clients can get in touch with their advisors using video chats or text messages – but also take a peek into advisors' calendars to schedule a meeting.

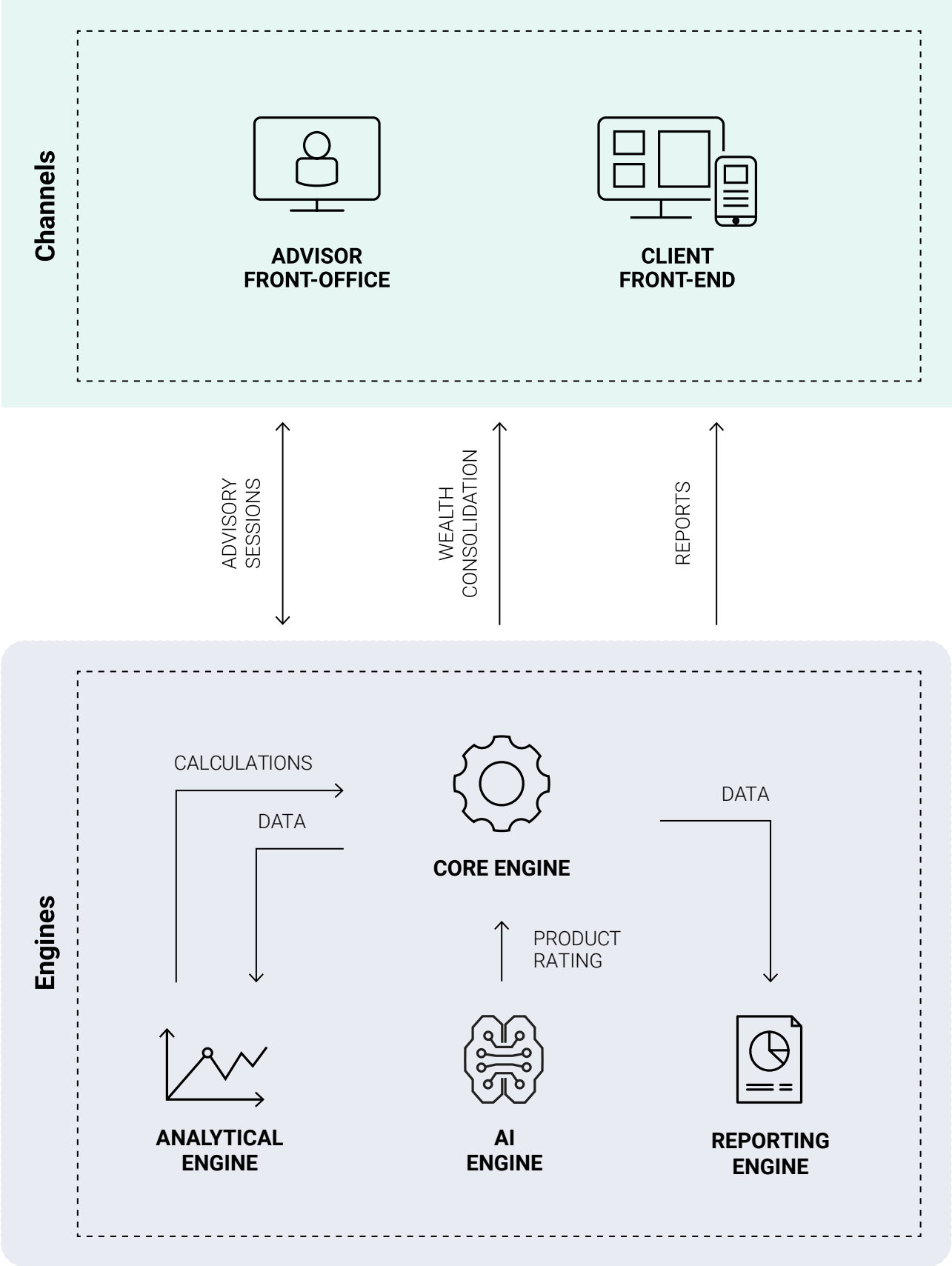


### **We say 'no' to the lack of self-service tools and let your clients take the reins**

With CWM for mobile platforms, you can guide your clients towards financial discipline. Thanks to tailor-made investment ideas, notifications, or automated rebalancing, the clients always stay on top of growing their wealth – and know how to grow it themselves.



# Platform applications



# Various business models – one integrated approach

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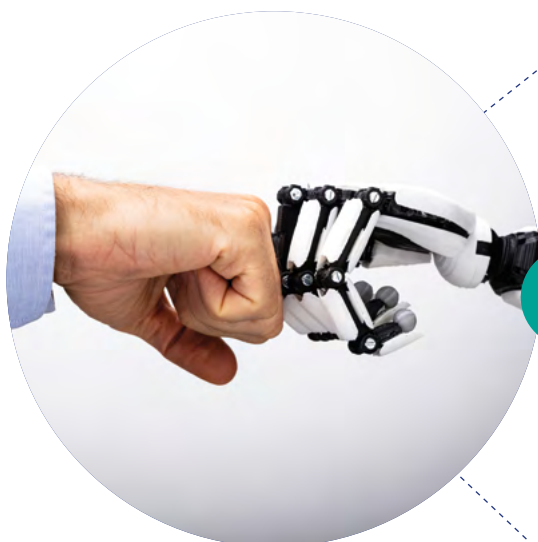
## Personal advisory

Tool for advisors



## Hybrid-advisory

Tool for clients with possible  
collaboration with advisor



## Robo-advisory

Tool for clients



# COMARCH

## CONTACT US

Visit [www.comarch.com](http://www.comarch.com) for the contact information of our offices in the following countries:

<b>Argentina</b>	<b>Panama</b>
<b>Australia</b>	<b>Peru</b>
<b>Austria</b>	<b>Poland</b>
<b>Belgium</b>	<b>Russia</b>
<b>Brazil</b>	<b>Saudi Arabia</b>
<b>Canada</b>	<b>Singapore</b>
<b>Chile</b>	<b>South Korea</b>
<b>China</b>	<b>Spain</b>
<b>Columbia</b>	<b>Sweden</b>
<b>Finland</b>	<b>Switzerland</b>
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<b>Luxembourg</b>	<b>United Arab Emirates</b>
<b>Malaysia</b>	<b>United Kingdom</b>
<b>Mexico</b>	<b>USA</b>

## ABOUT COMARCH

Founded in 1993 in Kraków, Poland, Comarch prides itself on being one of the leading software houses in Europe with over 6000 employees worldwide and thousands successful projects carried out for the largest international brands.

Over 20 years' experience in the industry, Comarch Financial Services, a business sector within the Comarch Capital Group, specializes in developing sophisticated software and IT systems for major financial institutions in banking, insurance and capital markets.

Our expertise has gained worldwide recognition and a significant portfolio of clients among insurers, banks, mutual and pension funds, brokerage houses and asset management companies in more than 30 countries. Our client list includes UniCredit, Société Générale, BNP Paribas, Ergo, Oney, Allianz, and more.

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