

Inform for Microsoft Dynamics

News and Research Recommendations

NexJ's Inform Digital Assistant enables advisors with Microsoft Dynamics to engage with their clients using content tailored to the client's interests. It allows advisors to deliver superior, value-added, customer experiences throughout the client lifecycle.

How It Works

NexJ matches client interests to news from wealth management-specific premium news feeds, 15k publicly available news streams, and a firm's own research. Advisors can quickly browse and send articles to clients. Inform can:

- Recommend exclusively licensed, highly trusted, fully FINRA, SEC, IIROC & FCA compliant content from industry recognized sources
- Maintain a regular cadence of communication with their entire book of business irrespective of how large it grows

Premium content contains no paywalls or advertising and can be branded to the firm or the advisor.

For an even better customer experience, use our Insights Digital Assistant to automatically discover new interests from unstructured text like emails and notes

Key Benefits

Improve client experience

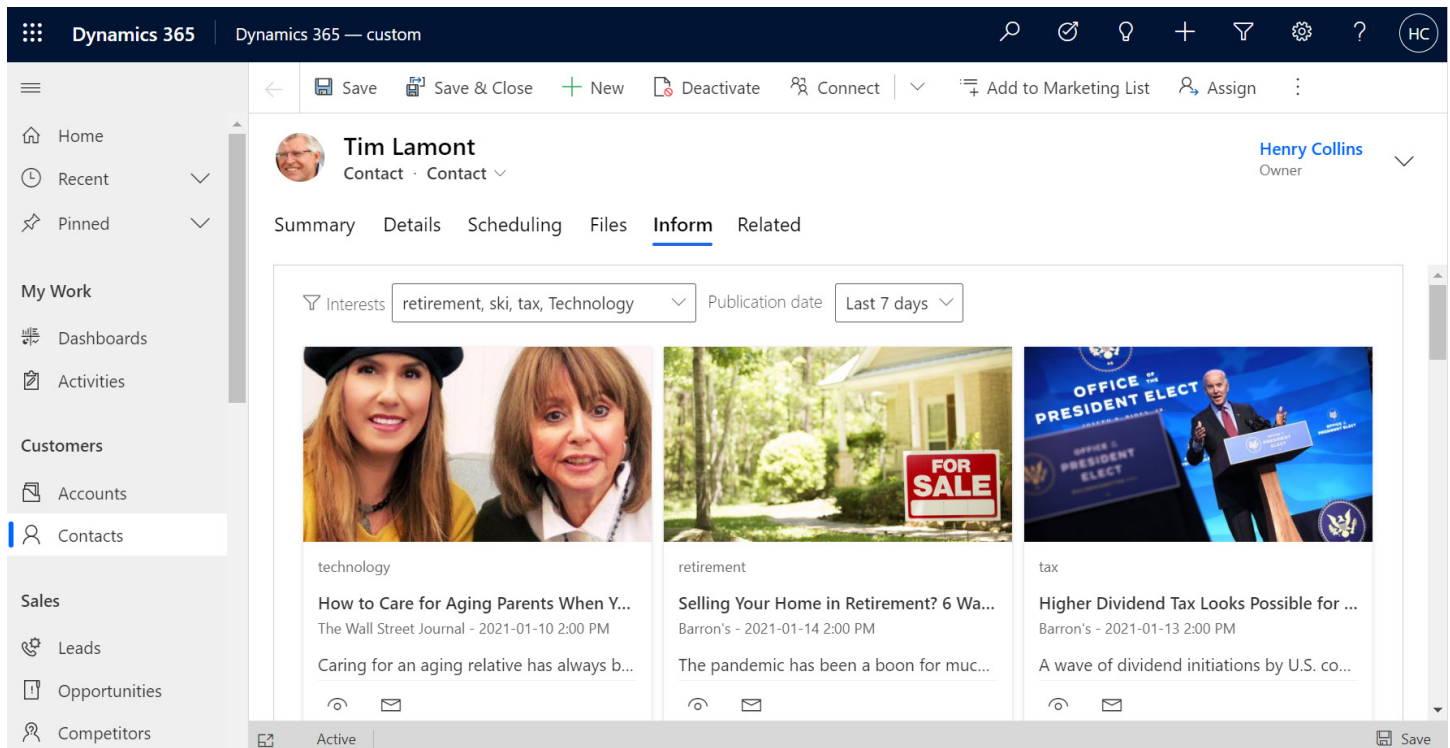
by delivering relevant and meaningful content with no paywalls or ads

Save time

by automating the selection of content that matches client interests

Build loyalty

by enabling regular, proactive interactions with clients



To learn more, visit www.nexj.com or email info@nexj.com



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About NexJ Systems

NexJ Systems is the pioneer of Intelligent Customer Management. Our award-winning CRM is designed to help Wealth Management, Private Banking, Corporate and Commercial Banking, and Insurance firms revolutionize their business. Powered by artificial intelligence, our products help drive productivity, boost client engagement, and increase revenue. With users in over 60 countries, our customers benefit from our deep expertise across financial services verticals, strategic investment in innovation, and commitment to their success.

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