Fluido Wealth360

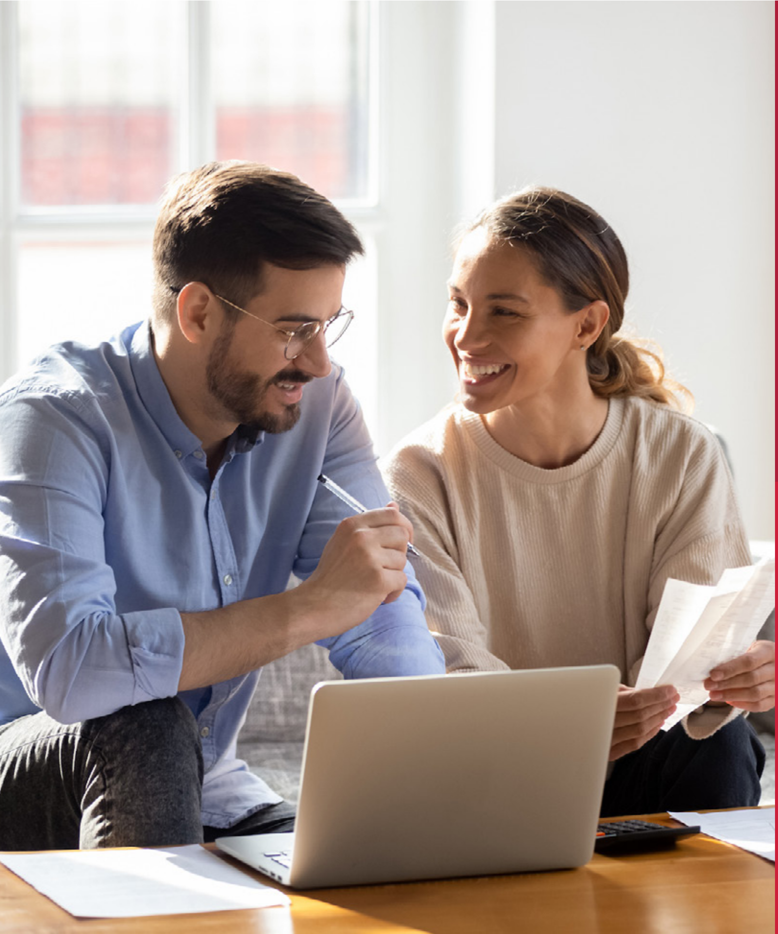
Closing the advice gap – Enabling financial choices – Supporting financial literacy – Promoting advice

Fluido Wealth360 has been designed to support adviser firms of any size, developing accessible technology that delivers efficiency in day-to-day processes, reduces re-keying and enhances user and client experience. Developed on the Salesforce platform, Fluido Wealth360 leverages and provides core capabilities required by any modern advice business. Features include a single view of the client and connected relationships, consistent processes with a clear and comprehensive audit trail, task allocation and orchestration, automation and enhanced reporting.

The opportunity to integrate disparate technologies, data and processes also becomes a reality through process consolidation via the flexible and connected client record, API integrations or leveraging an integration hub structure that enables customer and business '360' views to become a reality.

With an increasing focus of the FCA for the market to become data– and insight-led, along with the expectation of demonstrating fair value and outcomes within Consumer Duty, the dashboard capabilities and in-record presentation of data ensure that adviser firms are equipped for instant and real-time responses.

The efficiencies, enhanced experience and modern interface provided by Fluido Wealth360 will enable adviser firms to retain clients — across generations — and open opportunities to create new service offerings and be fit for the future.



Value for the adviser firms:

- Increased capacity — advice & support
- Managed costs — reduction in cost to serve
- Improved audit trail and outcome management
- Modern channels of engagement
- Simplified processes
- Continually compliant/regulation ready
- Access anywhere

Value for the clients:

- Enhanced experience
- Engage on own terms
- Improve financial literacy
- Advice becomes accessible
- Confidence in the future — individual and family
- Future-ready technology

Fluido Wealth360

New client onboarding
Manage new client leads & opportunities throughout the sales funnel from pre sale to implementation, understanding win/loss ratios and opportunity age

Activity Timeline
Singular view of all events, tasks and activities capturing date, time and owner

Financial Holdings/Accounts
Detailed summary of all accounts (Investment, Banking, Assets & Liabilities) relating to clients

Dashboards & Reporting
Comprehensive suite of dashboards providing 360° view of business, operational, clients and regulatory reporting, including Consumer duty MI

Document storage*
Hold key client documentation on client record or related to specific activity

fluido
an Infosys company
Wealth360

Client Management
Develop thorough client relationship information, connecting all activities, tasks and interactions and managing completion with validation and mandated fields

Life Events
Set key goals / events across the lifetime of the client, visualised via timeline

Relationships/Actionable Relationship Centre (ARC) Develop 1-1 or 1-many relationship models to manage to reflect associations across clients , consolidate views to manage 'household' wealth and joint activities

Business Process Management
Manage processes, workflow and associated tasks consistently and efficiently reducing completion time, managing handoff within the platform

Self Serve Client Portal
Enable efficient client servicing with fully integrated and branded portal, reducing manual intervention and paperless communication

Additional Features

Document production and management system ✣
Automate pre defined processes for users, supporting document production, know your customer (KYC) and client onboarding

Product valuation and portfolio insight ❊
Reduce manual effort updating product values with regularly updated product valuations and charges information

Enhanced Data Security ✧
Extended security and event monitoring providing additional control

✣ Functionality requires additional build (price determined by requirements) then included in monthly licence
❊ Third party source to be procured by client with integration completed by Fluido (price determined by requirements)
✧ Functionality required addition build (price determined by requirements) and additional licence costs

Support

Enhancements ✲
Up to 5 small enhancements supported per quarter to ensure solution aligned to business process

Release Management
3 releases per year providing upgrades and enhancements, deployed where required or impact

Issue Management
Service support available during business hours to resolve issues

Data Load ❄
Record creation via data upload on receipt of cleansed data

Training
User training provided ensuring consistent understanding and competence across user base

✲ Additional / larger enhancements can be supported (price determined by requirements)
❄ Additional data support services can be provided (price determined by requirements)

Schedule a demo here:
https://www.fluidogroup.com/fluido-wealth360