

IntellectAI and St. James's Place receive coveted industry recognitions as they redefine Adviser Led Wealth Management on Salesforce

Marking a new era in wealth management, this award-winning collaboration leverages Salesforce to redefine the wealth management landscape, showcasing a commitment to technological excellence and a customer first approach

London, 8 January, 2024: [IntellectAI](#), the wealthtech and insurtech business of Intellect Design Arena, has achieved a landmark accomplishment in strategic partnership with St. James's Place (SJP). Their collaborative effort has been honoured with two coveted awards: The Financial Services Project of the Year by the UK IT Industry Awards and Best Financial Services IT Team by the FSTech Awards 2023. These recognitions come in light of their pioneering programme in Adviser led Wealth Management implemented on Salesforce, a project that stands as one of Europe's largest in the Wealth Management industry.

The programme, now a cornerstone in SJP's digital strategy, supports over 10,000 users and manages a daily business inflow in excess of £60M. It marks a notable digital transformation, introducing advanced technology stack, integrations and development approaches. These were complemented by a robust development and deployment model, ensuring the handling of the complexities and scale of the programme. The strategy involved branching and release management techniques that allowed multiple teams to work concurrently across various aspects of the system.

Further emphasising security and compliance, the programme included the implementation of Salesforce Shield and robust cyber security measures, ensuring the highest standards of data protection and system integrity.

The return on investment from this initiative has been remarkable. A custom-built business value calculator underlined significant gains in process efficiency, client engagement, and cost reductions. The migration of Confidential Financial Review (CFR) capability into Salesforce has not only streamlined client management but also enabled the decommissioning of legacy systems, resulting in substantial cost savings.



Reflecting on the partnership and project success, **Banesh Prabhu, CEO of IntellectAI**, quoted, "Our longstanding partnership with SJP, spanning over a decade, has been foundational in achieving this milestone. The dedication of our teams and the innovative spirit of our partnership have been crucial in creating an ecosystem that not only meets current needs but sets a new standard for the future of wealth management."

Echoing the sentiments, **Karen Stevens, Digital and Change Director, St James's Place**, said, "The journey with IntellectAI has been transformative for our wealth operations. Their expertise in Salesforce

solutions has revolutionised how we manage wealth, enhancing our client services and operational efficiency significantly. These recognitions are a testament to the strength of our collaboration and the exceptional results it has produced"

These awards are more than just recognition; they symbolise the enduring partnership between IntellectAI and SJP and their commitment to innovation and excellence in financial technology. The program sets a benchmark in digital wealth management, demonstrating the transformative power of strategic collaboration and forward-thinking.

About St. James's Place

St. James's Place Wealth Management is a leading UK wealth management organisation. Founded in 1991, St. James's Place was listed on the London Stock Exchange in 1997 and is a FTSE 100 company, with over £129 billion funds under management. The company provides face-to-face advice to clients based on their individual needs and circumstances, adapting the advice as requirements change over time to ensure that recommendations remain appropriate. Website: <https://www.sjp.co.uk>

About Intellect Design Arena Limited

Intellect Design Arena Ltd. has the world's largest cloud-native, API-led microservices-based multi-product FinTech platform for Global leaders in Banking, Wealth Management, Insurance, and Capital Markets. It offers a full spectrum of banking and wealth technology products through its three lines of business - IntellectAI, Global Consumer Banking and Global Transaction Banking. With over 30 years of deep domain expertise, Intellect is the brand that progressive financial institutions rely on for digital transformation initiatives.

Intellect pioneered Design Thinking to create cutting-edge products and solutions for banking and insurance, with design being the company's key differentiator in enabling digital transformation. FinTech 8012, the world's first design centre for financial technology, reflects Intellect's commitment to continuous and impactful innovation, addressing the growing need for digital transformation. Intellect serves over 270 customers through offices in 57 countries and with a diverse workforce of solution architects, and domain and technology experts in major global financial hubs around the world. For further information on the organisation and its solutions, please visit www.intellectdesign.com

About IntellectAI

IntellectAI offers a suite of contemporary artificial intelligence products and data insights triangulated from thousands of sources that take a strategic approach to tackling the biggest challenges for the wealth and insurance industries. Our underlying technology powers sophistication with simplicity ensuring an engaging and insightful user journey.

Our AI cloud native products are known to address the most complex business objectives with the highest accuracy of outcome. Our skilled technical experts and data scientists seamlessly augment our



customer teams to accelerate their transformation journey, easily adapting as business models and technology evolves. www.intellectai.com

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