intellectAI

Empowering relationship managers to enable superior customer experiences

WealthForce.ai

AI AND DATA EMPOWERED RELATIONSHIP MANAGER

IntellectAI's contemporary front-office solution, WealthForce.ai, is a cloud native, BIAN-compliant solution that leverages emerging technologies to deliver hyper-personalised services. WealthForce.ai improves the productivity of the relationship manager through its AI and data-driven holistic and actionable customer insights in a unified 360 degree view, ensuring a sophisticated customer experience.

Five key areas that WealthForce.ai supports

New Business Generation

a. Cognitive Campaign Management with advanced data analytics

b. Paperless 5 minute DIY account opening with embedded Docusign and advanced biometrics

c. Nudges backed by deep data analytics

d. AI-based recommendation for next best product to cross sell and up sell

Hyper-personalised Customer Engagement

a. Real-time 360 degree view for customised portfolio management

b. Virtual advisory done using collaboration, screen sharing, messaging apps, customer authentication, etc.

c. Explainable AI-based client engagement indicator

Planning and Advisory

a. Bundled advanced analytics like Portfolio Attributions, Back Testings, Risk Analytics, Future Projections, Scenario Analysis, AI/ML based Customer Attrition predictors, and Monte Carlo simulation to make informed decisions

b. AI-based portfolio optimiser to obtain optimal portfolio allocation of a desired risk profile to gain maximum return

c. Algorithms to understand the customer needs

Monitoring

a. Automatic portfolio tracking and alerts for rebalancing in case of deviation from investment strategy defined

b. Monitor your ESG investments

c. Smart portfolio health check

d. Powerful 3D compliance to address regulatory needs, across customer mandates, bank and regional regulatory policies, mitigating risks

Execution

a. Hyper automation – end-to-end order fulfillment

b. Voice to text data capture

c. Single platform with dynamic rules engine for supporting multi currency, multi entity and multi country data, lead/ prospect management, and more

We measure our success by the success of our customers.

Some of the business impact metrics noted across some of our implementations include:

40% increase

in RM to customer ratio was possible through aggregated portfolio, 360 degree view across investments, liabilities, insurance and cash and equivalents, along with virtual collaboration tools.

30% increase

in customer base. The projected 20%, attributed to AI-based prospect propensity manager, customer churn predictor, and cognitive campaign management.

80% improvement

in portfolio review time per customer due to Anywhere Anytime access, AI-based portfolio optimiser, simulations and analytics with prompts and alerts.

5-minute

paperless and digital account opening with AI-led Doc2API tool and seamless integration with biometrics such as Mykad, MyInfo, and Aadhar.

30% increase

in operational efficiency with ready adaptors to Bloomberg, Allfunds, Euroclear, and Clearstream.

WealthForce.ai has out-of-the-box modular capabilities that enable wealth businesses to innovate and scale quickly. The efficacy of our platform has been well tested and already caters to the gambit of business needs across markets. The platform has been a partner of choice for global banks, and some visionary banks in the Asia Pacific partnering in their business growth vision.

Recognitions

WealthBriefingAsia AWARDS2023

Won the Artificial Intelligent (AI) Application (Pan-Asia) category in the 11th annual WealthBriefingAsia Awards 2023.

Selected to FintechGlobal's 2023 WealthTech100 list, recognizing the 'most innovative global wealthtech companies'

AiteNovarica

Featured as a Leading Core Banking Vendors Catering to Wealth managers in Aite-Novarica's report titled "Wealth-Management-Focused Core Banking Systems inv Europe and Asia"

Ranked #2 for Private Banking and Wealth Management in IBS Sales League Table 2022

We would be happy to schedule a call with you and your team.

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