



Rapidly create a unified, intelligent advisor experience to orchestrate more efficient and personalized client and advisor interactions, scaling your business for the future.

Disparate Systems & Manual Processes Cause Advisor Inefficiencies

The rapidly growing mass affluent market, shrinking fees, and shortage of advisors, coupled with fragmented networks of data and systems, have left Wealth Managers unable to provide the elevated, personalized experiences clients crave at scale. Most advisors are still spending far too much time, due to:

- **Manual processes** that slow advisors down, preventing them from fostering new relationships and better servicing their existing ones
- **Siloed data and systems** which create bottlenecks in client servicing, reporting, meeting prep and more
- **Fragmented client and advisor experiences** that cause long, inefficient servicing cycles and can negatively impact CSAT

Reimagine the Advisor Experience with Unqork and AWS

Together, we are empowering leading Wealth Managers to rapidly build custom, seamless applications that modernize the advisor experience in weeks instead of months and years –without having to rip and replace their entire tech stacks. Discover why 4 of the top 10 wealth management firms rely on Unqork and Amazon Web Services (AWS) to increase advisor productivity and lower operating costs:

DRIVE CLIENT SATISFACTION

Unify the Advisor experience and drive personalized, data-driven decision making with Unqork to deliver better client interactions and growth.

BOOST ADVISORY PRODUCTIVITY

Centralize cognitive services and generative AI in a single view scaling your business for the future. Examples include:

- **Amazon Bedrock** to collate disparate information and personalize experiences, like meeting prep
- **Amazon Transcribe** to convert speech to text automatically so your advisors never miss a beat during a meeting
- **Amazon Rekognition** to automate image recognition and video analysis with machine learning, equipping advisors with the sentiment analysis needed to foster better relationships

QUICKLY AND SECURELY CONNECT APPS, DATA & SERVICES

Eliminate the advisor swivel chair effect with Unqork's Integration Gateway which makes it easy to connect 700+ pre-built connectors, including enterprise applications and database data, into Unqork quickly, securely and reliably.

SUCCESS STORY

One of the Top 3 Largest Wealth Managers Modernizes Their Advisor Workstation

Challenge

Prolonged investor onboarding and advisor workflows that relied on manual, paper-based processes and controls increased operational risks, opaqueness and security challenges. This wealth manager experienced low investor and advisor satisfaction and delayed time to revenue.

Solution

With Unqork and AWS, this wealth manager automated and digitized advisor workflows in a unified workstation with best-in-class tools, delivering differentiated wealth management solutions to accelerate their growth strategy.

Impact

Delivered

Onboarding maintenance application enabling a global team of 12K field users across 350 branches

Managed

A complex combination of 40 products, 13 ownership types and 4 party types

Digitized & Automated

30+ client service workflows with over 20 integrations and 35 personas