CAS Companion Wealth

Bringing into context the right technology, information & insights for Advisors-Client live interactions through Microsoft Teams

Solution Sheet

Highlights

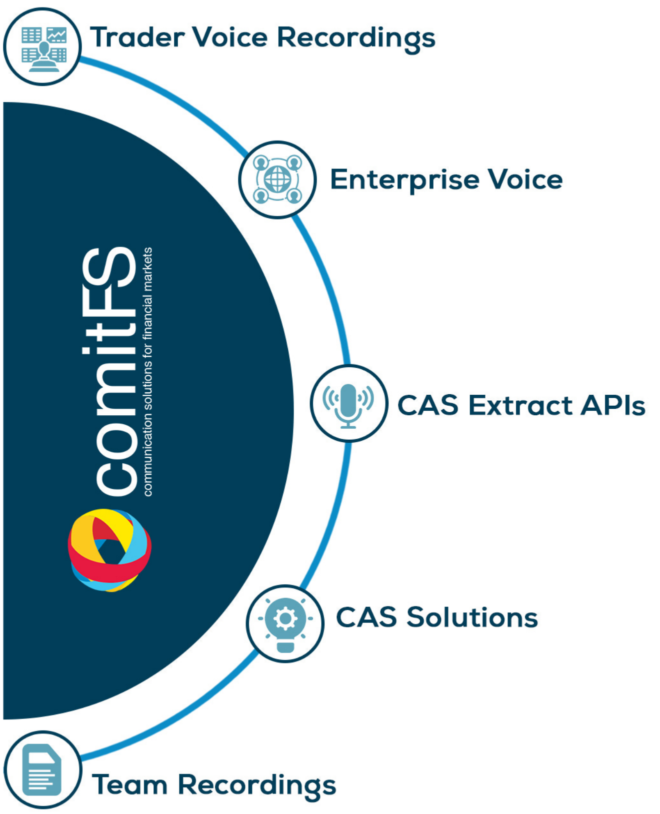
- Advisor experience through Enhanced workflow, richer information density and integrated follow up
- Client experience through increased service consistency, greater call engagement and improved call content
- Business owner outcomes through improved data capture, seamless compliance and ability to address Advisor requirements

Financial Advisor Drivers

- Reduce the complexity for the advisor Clients secure best possible advice each & every time
- Financial Advisors increase AUM

Product Owner Drivers

- Unlock insights from meta data of every interaction
- Leveraging Microsoft accelerates dev cycle
- Lower TCO Vs DIY Build



Advisor time is an expensive and finite resource for the Firm Most Advisors spend a significant portion of their day in client conversation, with the Phone being the primary means of live communication.

Deploying an integrated workflow product, designed to optimize for the Advisor experience, enables Business owners to improve a primary interaction moment between Advisors and Clients. Business owners will be able to enrich calls with embedded client intelligence, improve workflows, and increase service execution capabilities.

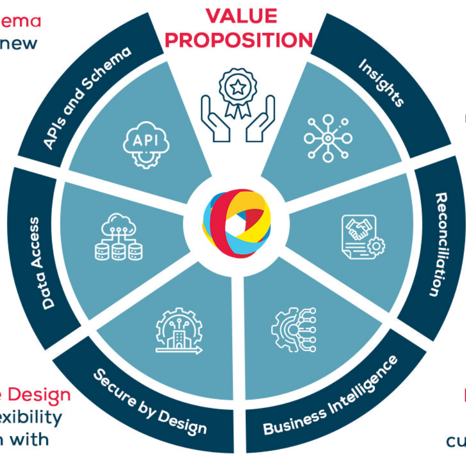
This enables Advisors to focus on what they do best: serve every client like their best client thus improving client satisfaction and engagement with their Advisor.

When client satisfaction and engagement improves, clients are more engaged with their Advisor, less likely to churn, and more likely to refer others to their Advisor, in turn driving new client acquisition and growth of AUM.

Open APIs and Schema
Normalise and link new data sets

Data Access Management
Role, location & retention controls

Flexible Experience Design
User Experience flexibility to seamlessly mesh with existing Advisor experience.



Insights
Deliver Client Insights when Advisors need it most; maximize the reach of opportunity management by placing them in context.

Reconciliation
Present Advisors with firm data in context to avoid the need to navigate and multi-task.

Business Intelligence
360-degree view of customer engagement

CAS Companion Wealth is dedicated to reshaping the client-advisor relationship by establishing an experience flywheel that enhances service consistency

CAS Companion will effectively "shrink the firm" and bring into context the right technology, information or insights investments you've already made at your firm into one simple interface designed enhance call workflow

This keeps advisors' attention to where it should be - on their clients so they can deliver their best, every live interaction .

Today Challenges & Risk

Advisors are asked to learn a new call system with limited to no workflow integration or specialization

Business and Platform owners have zero visibility into Call data flow, and no ability to enhance workflow for Advisors.

Disjointed call flows are perceived by Clients on their as distraction. Follow up actions can be inconsistent at best.

Advisors juggle multiple panes of glass for messaging (What App, WeChat & MS Chat)

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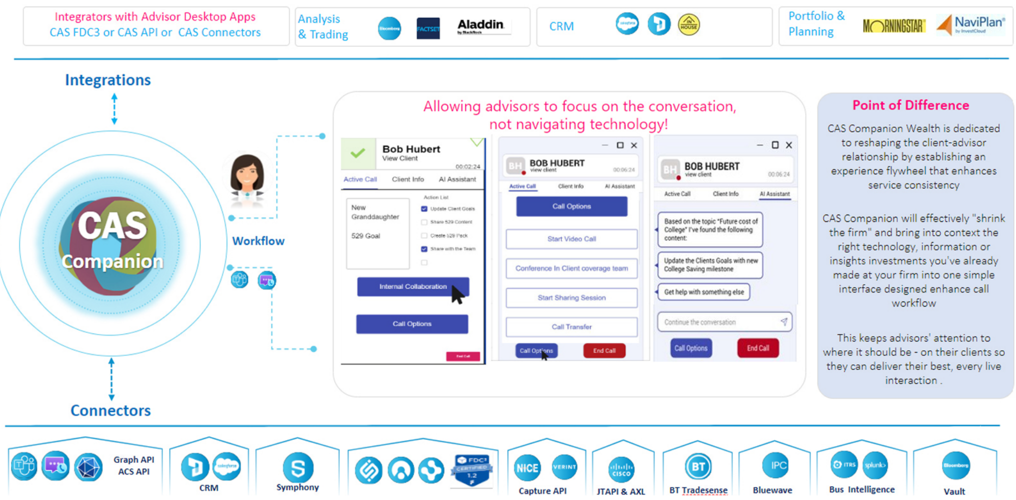

ROI

Financial Advisor

CAS Companion Wealth offers Advisors an integrated voice, video and sharing experience, with unified client information and communication in a single, user-friendly interface. Financial advisors can significantly reduce time spent on manual data entry and client outreach. The Generative AI add-in is a built-in knowledge system to enhance client communications, offering personalized recommendations that enhance client satisfaction and retention. Opportunity management ensures a structured follow-up process, maximizing client engagement and conversion rates

Firm Technology Teams

Maximize the existing investments towards CRM, voice communication, and business insight generation, by using CAS Companion Wealth to solve the "last mile" delivery problem. Analytics and CRM deployments often fail due to a lack of adoption. CAS Companion doesn't replace your CRM system, but it's seamless integration and automatic data entry on the part of the Advisor feeds both the CRM and firm's business intelligence systems by being embedded in workflow.

Business Leaders

Influencing and driving Financial Advisor behavior, is a challenging task for the firm's business leaders. By deploying CAS Companion Wealth, business leaders can inject into call workflow important initiatives, opportunities and client insights, informing Advisors and enabling them to serve their clients more effectively and a meaningful improvement in productivity across the Advisor population.

About comitFS

comitFS is a market leader in providing customers with a single middleware that ensures regulated conversations on devices work seamlessly within customer applications.
Today 5 of the worlds Top 10 Investment Banks choose comitFS.

comitFS is unique, in that our API middleware, CAS (Common Application Server), spans all major turret vendors and digital workplace operators including IPC, BT, Cisco, Avaya and Microsoft Teams. CAS improves the workflow for multiple personas in wealth, private, corporate and investment banking. The CAS platform provides a range of benefits across the organisation:

- Accelerate development and agility, providing developers a single API to code against
- Control costs, CAS software scales across multiple user personas driving savings
- Mainstream digital first plans, blending high touch conversations with desktop apps
- Supporting regulatory requirements, ensuring media remains on the regulated user device.

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