



Wealth Management



Advantages

To know your real and potential customer through data storage (risk profile, tax situation, product preference, delivered investment proposal, bought portfolio, etc.) in databases ready for exploitation through Data Mining or CRM processes.

To increase your advisory activity through processes industrialization.

To improve client experience, fidelizing your customer through a consistent advisory suited to fit his financial objectives and needs.

To control and thrust developed commercial activity.

To harness the power of technology with a solution that integrates, simplifies and aligns your technological infrastructure with your business objectives.

TechRules.com offers financial institutions a tailor-made, multi-channel and multi-functional solution that allows them to rationalize, industrialize and increase their wealth management business, making client relations more efficient and proactive, not only at the time of selling but also at the afterward follow-up.

We offer an advanced technology solution that allows integrating and automating all advisory complete cycle processes. It is not inflexible software, but a modular, tailor-made solution developed over the needs of our clients.