

TechRules CRM

A 360° view of each customer to allow financial advisors to be more efficient

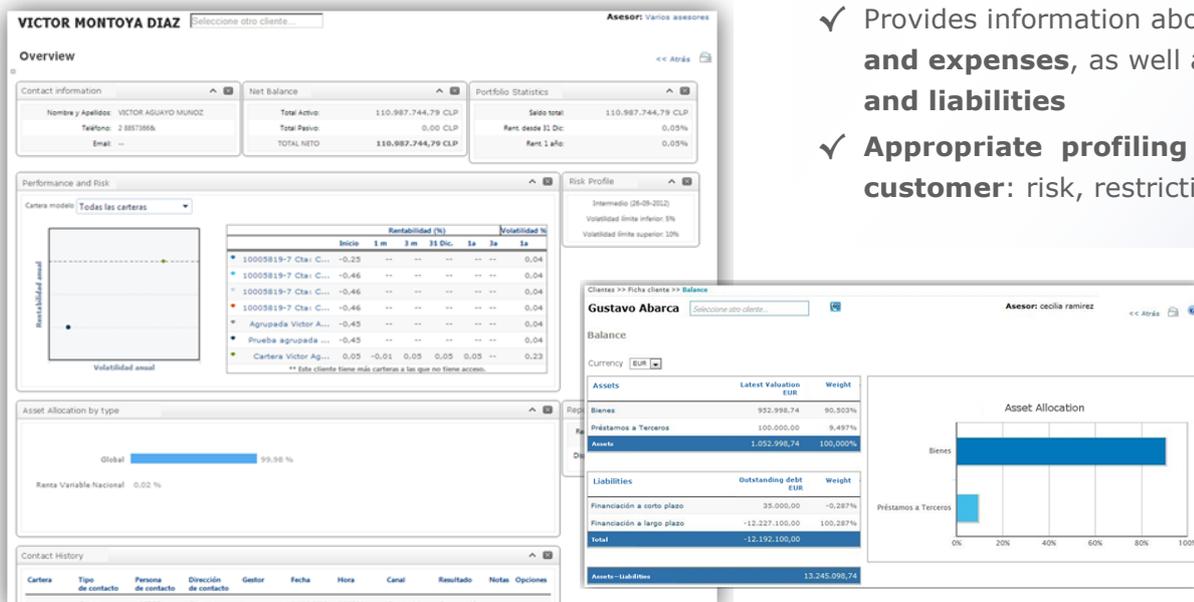
As the financial industry continues to consolidate in a changing environment, entities require **new and innovative strategies** to remain competitive, creating growth opportunities to contribute to the bottom line. That is why in order to provide value, **TechRules** enables wealth management firms to focus on their **core business: the clients**.

We help you to increase **efficiency, effectiveness and profitability** by streamlining and automating your processes.

TechRules Financial CRM helps businesses to provide better customer service, simplifying sales processes and increasing customer revenues.

Main Functionalities

- ✓ Operates integrating **existing Model Portfolios**
- ✓ Integrates **Rebalancing Module**
- ✓ **Performance and risk matrix** of all portfolios
- ✓ **Integrates data in only one application; SOA service**
- ✓ **Customizable advisory dashboard**
- ✓ Client net wealth in **different currencies**
- ✓ Provides information about **incomes and expenses**, as well as **assets and liabilities**
- ✓ **Appropriate profiling of the customer: risk, restrictions, etc.**



BENEFITS

- Identifying in just one click **where to take decisions** about customer portfolios
- Offers advisors a **graphical snapshot** of what's happening and what needs to be done prioritizing by advisor in their own personal or team calendar
- Be able to always **take risk under control** rebalancing customer portfolios
- Identify **more up-sell and cross-sell opportunities**
- Be more efficient by **prioritizing your tasks and alerts**
- Combines **operational and analytical customer relationship** management processes
- Focus on creating **customer's loyalty**

PLATFORM FEATURES

- Get **all relevant information** with just two clicks!
- Keep a **comprehensive record of customer contacts** as well as proposals, pending tasks, etc.
- Personalized and **easy to use interface**
- Single repository, all the information **integrated with core systems**
- **Broad overview** of the daily most important information
- Customize and **prioritize** what's more important
- Open solution, built as a **cloud based** platform
- Minimize administrative demands and **maximize client interaction**

With TechRules CRM and Task Planner solution, advisors will have all customer information (contacts, proposals, task and alerts, etc.) integrated in just one platform to take more efficient decisions and maximize customer interactions.

TechRules with more than 20 years of **proven expertise** and understanding of financial industry exceeds all expectations **providing 360° view of your customers.**

We manage and organize your client's data and provide easy to use reports that help advisors manage their client's portfolios, **being easy to integrate into existing banking applications at the same time.**

Tower CRM has been designed to **provide a high degree of flexibility** accessing to customer information either through the "Tower CRM platform" or through the existing systems of the bank.

360 ° Portfolio View

Client Risk Profile

Investment Proposals

Alerts & Tasks

Investment and grouped portfolios

Financial Planning Proposals

Rebalancing Process

TechRules
CRM & Task Planner



The screenshot displays the 'Clients alerts' section of the TechRules CRM. It features a 'Priority alert' section with a dropdown menu and a 'Portfolios alerts' section with a table of alerts. An 'Alert edition' dialog box is open, showing 'Priority' and 'Activation parameters' (Variation: %). Below the dialog, there is a table of alerts with columns for 'Priority alert', 'Description', 'Activation parameters', 'Priority', and 'Options'. The 'Alerts Group Summary' table is also visible, showing a list of alerts with columns for 'Name', 'Center Center code', 'Manager Manager code', and 'Options'.

Name	Center Center code	Manager Manager code	Options
Grupo18_102	QTEST 167	Many managers +	✎ ✕
Agrupacion1506_2	QTEST 167	Many managers +	✎ ✕
Agrupacion1506_1	QTEST 167	Luis Miguel R 169	✎ ✕
Grupo1506	QTEST 167	Many managers +	✎ ✕
Nueva	QTEST 167	cecilia ramirez 186	✎ ✕
Agrupacion1005_3	QTEST 167	Many managers +	✎ ✕
Agrup1005_2	2cnetro nivel2 171	Many managers +	✎ ✕
Agrupacion1005	QTEST 167	Many managers +	✎ ✕
Agrupacion Gian	2cnetro nivel2 171	Many managers +	✎ ✕
AgrupacionMinaya	2cnetro nivel2 171	Many managers +	✎ ✕
Grupo456	2cnetro nivel2 171	Aitana Diez 607	✎ ✕
PruebaFinal1	2cnetro nivel2 171	Aitana Diez 607	✎ ✕
Prueba Juanvi	2.2. 175	Many managers +	✎ ✕
grupo987	2cnetro nivel2 171	Miriam Herrero 501	✎ ✕
Grupo180	2cnetro nivel2 171	Miriam Herrero 501	✎ ✕