CONTEMI

WEALTH INTELLIGENCE

Helping You Win Clients
Meet Their Investment Goals
And Your Business Goals

Digital Wealth Management Platform

- Client Onboarding
- Fees & Invoicing
- Performance Measurement
- Post Trade
- Corporate Actions
- Client Lifecycle Management
- Client Portal
- Portfolio Management
- Analytics & Reporting
- Trade & Order
- Banking & Cash Management

WealthBriefingAsia AWARDS 2021 — BEST ONBOARDING AND CLIENT PORTAL 2021

WealthBriefingAsia AWARDS 2021 — BEST REGIONAL CEO ALEX KREFFT

SYSTEMS IN THE CITY FINTECH CONFERENCE AND AWARDS 2021 — KEAN WILLIAMS – BUSINESS LEADERSHIP AWARD 2021

SYSTEMS IN THE CITY FINTECH CONFERENCE AND AWARDS 2021 — AMRIK SANGHERA- PRODUCT SPECIALIST AWARD 2021

2021 GLOBAL WEALTHTECH 100

SYSTEMS IN THE CITY FINANCIAL TECHNOLOGY AWARDS 2019 — BEST CORPORATE ACTIONS SYSTEM 2019 & 2020

SYSTEMS IN THE CITY FINANCIAL TECHNOLOGY AWARDS 2018 — BEST INVESTMENT MANAGEMENT APPLICATION 2019

WealthBriefingAsia AWARDS 2020 — ANALYTICS- BEST INNOVATION FINTECH SOLUTION 2017 & 2020

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Singapore. Hong Kong. Malaysia. Vietnam. Indonesia. UK. Norway. India. Australia

DELIVERING GREAT CLIENT EXPERIENCES IN UNSETTLING TIMES

Tom Burroughes, Group Editor at *WealthBriefingAsia*, talks **Gaurav Mehta**, Executive Director, Head of Sales, **Contemi Solutions**.

What has particularly marked you out for success in this category?

In the last year, more than ever, when investors needed timely access to information and, and wealth managers needed integrated and real-time information, analytics and digital communication tools to service their clients in the remote working environment, Contemi's client portal and on-boarding helped advisors seamlessly on-board new clients, enhance client relationships and better manage their practices.

In response to the challenges that wealth managers and financial advisors faced whilst trying to effectively communicate with their clients during the COVID-19 lockdown, Contemi quickly designed and launched a Lite version of existing Client Portal, a light touch, secure communication channel for smallest organisations to better communicate with their customers.

One of Contemi's clients more than doubled its number of investors using our Client Portal which placed so much emphasis on omni-channel, intuitive user experience and on customization for clients and advisors.

With restricted travel and in-person meetings, implementing our digital on-boarding and client communication tools proved to be quick wins for our clients' long-term digital strategy.

What sets you apart from your peers this year?

Digital customer communication and engagement dominated the agendas of Wealth Management firms over the last one year and we remained committed to ensure that WM firms have access to the tools to meet their agendas.

What we hear from our customers is that our solutions provided them considerable assistance to during a time that experienced high volumes of activity.

What are you going to do to stay on the front foot in a fast-growing but also challenging region such as this?

At Contemi, we are committed to make the wealth management journey seamless for everyone involved, and our Wealth Intelligence (WIN) suite makes it possible with its front, middle and back-office tools.

We will continue to innovate our solutions, with a key focus on empowering Investment Managers to take informative decisions, and RM's to deliver a truly omni-channel personalised customer experience, with our award-winning analytics, client portal and reporting, portfolio management and client lifecycle management solutions.

In Asia, we have a presence in Singapore, Malaysia, Hong Kong, Indonesia, Vietnam, India and this is growing. We have significantly extended our team this year to focus on increasing market share within the region.

We are investing heavily into R&D across our solutions portfolio to ensure client needs are met in an ever-changing marketplace. And these awards are testament to our focus on continually developing our solutions to meet and exceed client and market requirements.

What are the prospects for wealth management in the future bearing in mind a new social and economic environment ahead?

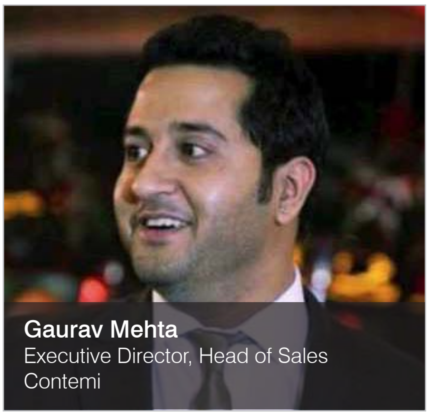
The changing social and economic landscape requires wealth management firms to take a unified approach to transformation, including reinventing the customer experience, reimagining data flows across the organization, and integrating technology into investment decision-making and product capabilities.

The ability to forge trust and create hyper-personalised customer experiences at scale will be new key core competency, where cloud and AI will play a huge role.

What do you hope will be the result of receiving this accolade? How does it help your business in this region?

Winning the *Best Client Communication and On-boarding Solutions* award in the region, endorses the excellence that we are achieving in this area as a leading technology solutions provider to the financial services industry. As well as it is certainly a strong encouragement for us to know we are heading in the right direction in a highly competitive market.

We hope it will help us highlight the relevance of the digital on-boarding and client communication, and help wealth management firms, in their evaluation, that seek to work with a trusted partner for their technology needs. In a virtual world, trust is more than ever the key component of doing business in our space. ■



Gaurav Mehta
Executive Director, Head of Sales
Contemi

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CLIENT COMMUNICATION SOLUTION OR TOOL
WINNER
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REGIONAL MANAGEMENT TEAM/CEO
WINNER
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