

Customer-centric communications for wealth management



The financial crisis, global recession, and fears about a continuing fragile economy have significantly deteriorated investor trust and confidence in financial institutions. More than ever before, personalized, relevant communications with high-value clients is critical to demonstrating the transparency and attention necessary for both financial advisors and their financial institutions to rebuild trust and allay fears.

Personalized attention, timely and responsive advice is critical to delivering the best service possible for high-value customers and restoring trust and confidence in the face of volatile markets.

High-net-worth clients have complex financial needs and they count on their wealth managers to be proactive with advice on investments, tax and estate strategies, insurance, and more. Providing this kind of high-touch attention for a multitude of clients can seem like a daunting task. GMC's customer communication management solution is designed to enable you to easily generate the kind of relevant, personalized communications that solidify client relationships, strengthen loyalty, motivate investment decisions, and grow revenues.

A communications solution designed for real-time customer needs

With GMC's single-platform approach, the inefficiencies created when marketing, sales, and service activities are siloed around individual financial products is a thing of the past. Our comprehensive software solution fully integrates with existing systems and databases, eliminating the customer confusion that is too often created with disjointed marketing efforts.

Multi-line investment and private banks can leverage a customer-centric approach that allows them to automatically access client data from multiple sources, design and produce personalized, compelling communications for individual clients; and deliver those communications via the preferred channel – whether that is email, online presenta-

tion, SMS messaging or other mobile platforms, variable data documents, or other electronic or print communications. You can also coordinate message management and greatly expand efficiency with the ability to consolidate documents and repurpose information across all channels.

Easy-to-understand statements and reports reduce client inquiries and build trust and rapport. GMC enables faster onboarding of new clients and implementation of new marketing and advising initiatives, helping you stay ahead of the competition and strengthen your brand with the addition of colorful graphics, charts, and images.

Accessing the data you already have, our user-friendly toolset makes it possible to design and implement even the most complex personalized communications with a full range of data handling, layout, graphical workflow, color management, content collaboration, approval and proofing, and message management capabilities.

Improve customer service with responsiveness on demand

Changing the way we communicate with clients has never been more important than it is today. Providing instant response to client needs is simple with GMC's Web-enabled solutions that turn traditional paper-based processes into a seamless, paperless, browser-based flow with communications that stay consistent with corporate branding and compliance requirements, yet make it possible to get information out quickly.

For added convenience and customer care, templates can be uploaded to your website so advisors can view documents in true fidelity, making client inquiries more productive. Customer relationships are further enhanced with the ability to provide dedicated client portals that make it possible to view documents on demand. And, with our user-friendly software, business users are able to access documents for the purpose of editing content and adding marketing messages, all within a controlled, defined process.

Repurpose legacy systems to support customer preferences

Every enterprise today must be organized around its customer's preferences. When it comes to producing and delivering consistent multichannel communications, coordinating multiple, separate legacy applications and sys-

tems can be a time consuming and costly process. It often involves the expensive parallel development of multiple separate channel communication systems to overcome inflexible and obsolete print-centric software.

Taking a holistic, evolutionary approach, rather than a disruptive revolutionary one, GMC's customer communications management solution avoids the need to rebuild data structures, content and business logic, thus preserving the value of existing environment integration in legacy systems.

With GMC's flexible architecture and multichannel scope, legacy application print output can instead be easily repurposed – enabling you to access the legacy communications' customer data and content and transform it into new communications that can be sent through your customer's channel of choice. Business users can take existing customer information and content, extract it, reformat it and recompose it with other targeted data to create highly personalized color communications with variable images, marketing messages, dynamic graphs and much more for print or digital channels without the need to touch any of the backend systems and processes or enlist IT support.

Increase agility, lower operating expenses

Our single platform offers the most secure, reliable and scalable solution on the market today. Its modular design, SOA architecture, and straight-through processing (STP) capability supports seamless integration with existing infrastructures, formats, processes, and data flows. Its compatibility with all output formats lowers your total cost of ownership, and our flexible, intuitive interface reduces dependency on IT resources.

GMC's automated workflow capabilities are designed to eliminate cumbersome, slow manual processes, accelerating time to market with timely investment information. Ensure legal compliance is controlled, with the ability to include or exclude specific content based on effective dates to support changing regulations. Having the operational dexterity to make simple changes on individual investment reports and other client communications – and the scalability needed to meet the dynamic requirements of your business – enables rapid adaptation to changes in market and regulatory conditions as they occur.

A true enterprise solution

Our strength as a partner also comes from the fact that we offer more than a comprehensive software solution. Our

The GMC advantage

- A single platform for designing, maintaining, and delivering coordinated, consistent communications
- Leveraging existing business applications for member delivery preferences
- Get to market two to three times faster with new products and services
- Raise the level of customer satisfaction and loyalty
- Add targeted, informative messages and other content to transactional documents
- Extend content and control via Web browser
- Minimize risk and ensure regulatory compliance
- A scalable solution that improves efficiency and reduces costs
- Expert consulting, training, service, and support to get the most from your investment

financial services professional services team is available to provide the expert consulting, training, service, and support you need to design, implement, and operate a customer communication management solution that is tailored to the specific needs of your organization. Our added support increases agility and speeds migration significantly.

A true market differentiator is always the quality of your customer communications. From the simplest document design to the most complex, GMC's customer communications management solution is designed to handle an extremely wide range of personalized applications efficiently and accurately. Our comprehensive software suite supports document composition capabilities that deliver more cost-effective compelling, customized wealth management communications.

The perfect choice for all your applications

With GMC's solution, you can easily create customized

- Letters and correspondence
- Account statements
- Trust statements
- 401 (k) statements
- Confirmations
- Brochures
- Portfolio reports
- 1099s and tax reports
- Marketing materials

