doxim®

TRANSFORMING CUSTOMER EXPERIENCE

Doxim Customer Engagement Platform

for Wealth Management

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COMPETING IN
The New Digital Economy

Key Benefits

- Empower advisors and staff with tools to focus on value-added activities
- Let clients consume information in the way they want, on the device they choose, at the time they need
- Provide efficient processes to save time
- Use analytics to understand your clients
- Never ask the client more than once for the same information
- Add value to every interaction with relevant, personalized offers
- Provide a compelling, consistent experience to clients regardless of channel

Driven by tighter regulatory standards, technology advancements, and new service providers, the wealth landscape is more complex and competitive than ever. As a result, wealth management firms need to spend more time on core deliverables such as building wealth for their clients and delivering superior and personalized service. The challenge - firms must balance these tasks against their perennial need to improve back office performance and the quality and speed of client services.

Thankfully, addressing these needs just got easier. Introducing the Doxim Customer Engagement Platform, a suite of integrated financial services solutions for wealth providers that help you build client satisfaction and loyalty while cross-selling effectively during key moments in the client lifecycle.

With our Customer Engagement Platform you can:

- Understand your clients and their preferences better – use deep analytics to data mine client trends and preferences for personalized service and product offerings.
- Deliver an omni-channel experience - mobile client onboarding, online statement access, digital services, on-demand 24/7.
- Automate steps along the client lifecycle - maximize time spent with clients with digitized and streamlined onboarding, freeing up staff to engage in client conversations.

COMPETING IN
The New Digital Economy

HELPING OVER 1,700 FINANCIAL INSTITUTIONS GROW

Doxim helps you focus more time on building relationships, while we focus on helping you deliver an intuitive, modern, and engaging experience for clients and advisors. We've used our deep industry expertise to design our Customer Engagement Platform for wealth management firms.

- Purpose built for financial institutions by experts in the wealth industry
- Fully integrated into your core back office systems for easy access to critical data.
- Modular software platform - plug in solutions individually or as an integrated suite.
- A complete omni-channel experience for all users from advisors to clients to compliance.
- Store, manage, and archive all reporting and correspondence in the centralized ECM cloud repository for digital access.

Client Interactions that Build Loyalty and Wallet Share - streamline paperless client onboarding and account transfer processes that replace slow, impersonal exercises in form filling.

Gain Deep Insight about your clients- analyze the data you gather during interactions with clients to define powerful, targeted marketing campaigns and insert ads right into your statements.

Communications your clients Love to Read - client statements and reports can be difficult to read, expensive to produce, and full of impersonal jargon. Transform communications into easy to read, tailor-made documents with personalized 1:1 marketing zones.

Automate all correspondence - ensure your trade confirmations and other client communications are distributed online and printed with accuracy, speed, and efficiency. Take advantage of our Year End Tax processing service.

DOXIM SOLUTIONS
For Wealth Management

Doxim Client Onboarding automatically guide the account opening process allowing your Wealth Advisors to focus on building client relationships and uncovering sales and service opportunities, rather than shuffling forms and papers.

Doxim Securities Based Lending helps financial service providers streamline their business and tap into new revenue opportunities by enabling a fast and easy process for executing securities based loans.

Doxim Statements, Trade Confirmations & Reporting helps convert your statements from compliance documents to fully-fledged marketing vehicles, composed, processed, and delivered via your clients' preferred channel.

Doxim Year End Tax Forms fully automate electronic tax form processing, from receipt of initial files, right through to insertion into the postal system and/or upload to an online document repository.

Doxim Content Management provides archival, search, and retrieval for clients statements, trade confirmations, and tax forms. With unlimited categories and metadata, searching is fast and easy. Use our API to easily integrate with existing client interfaces.

Doxim is the customer communications and engagement technology leader serving financial and regulated markets, providing omnichannel document solutions and transforming experiences to strengthen engagement throughout the entire lifecycle. The Doxim Customer Engagement Platform helps clients communicate reliably and effectively, improve cross-sell and upsell opportunities, and drive increased loyalty and wallet share through personalized communications. The platform addresses key digitization, operational efficiency, and customer experience challenges through our suite of plug-and-play, integrated, SaaS software and document technology solutions. Learn more at www.doxim.com.

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