unqork

Unqork for Wealth Management

Deliver personalized customer experiences while minimizing cost and risk.

Digital transformation has never been more important in the wealth management industry. Clients are shifting from active to passive strategies, robo-advisors are gaining market share, and breadth and depth of services is more important than ever. But the path forward can be unclear and risky: off the shelf software requires intense customization efforts while traditional development can be complex and expensive. With Unqork wealth managers can move from inflexible, rigid systems to an adaptive platform allowing you to fully digitize operations, grow, and scale in the future.

Key Benefits

✔ **Speed to market:** Digitize operations like account opening rapidly using a completely visual platform.

✔ **Flexibility:** Respond quickly to regulatory changes or client demands without extensive IT projects or long cycle times.

✔ **Lower costs:** Lower total cost of ownership by avoiding expensive software upgrades and large maintenance projects.

✔ **Improved collaboration:** More easily collaborate and communicate business processes, make changes visually rather than having to write code.

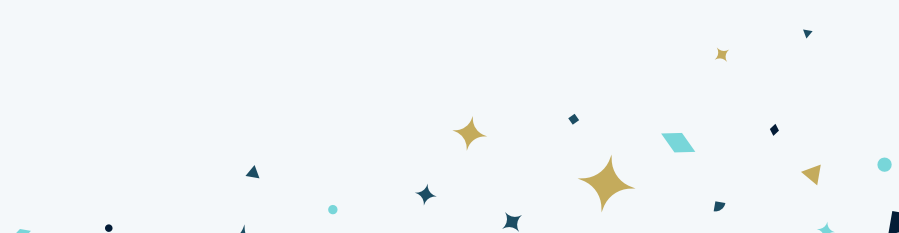✔ **Easier hiring:** Train engineers in weeks without extensive software development knowledge.

Example Wealth Management Solutions

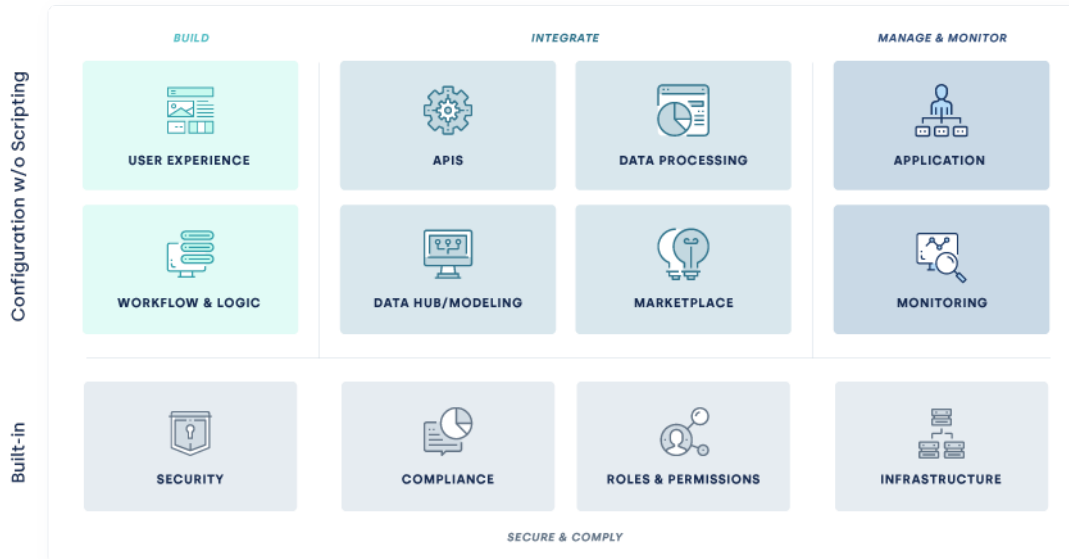|	
Account Opening	Digitize client onboarding and new business spanning all product lines with enterprise app allowing for direct client outreach, integration with 3rd party data providers, due diligence assessment and orchestration across functions.
Servicing	Build a front-door into cash flow servicing processes, beneficiary updates, claims notification and other common customer servicing tasks; mitigating operational risk.
Underwriting	Today's process often involves an intrusive, disparate, and generally led by human interactions. Move to a fully digital process that feeds into a centralized rating engine.
Policy Issuance & Selection	Build a simple, easy-to-use front end for today's disparate policy admin, document creation systems, and billing systems so you can easily generate policy documents and set up accounts in your systems of record.

Everything you need to build enterprise quality applications without having to write a single line of code.

Customer Success Story

A global wealth manager facing revenue slowdown due to low-advisor productivity and prolonged time to onboard and service clients. The firm's margins are under pressure due to the high operational cost and risk driven from manual processes and controls. Using Unqork, the wealth manager developed an end-to-end digital solution fully automating client/advisor data capture, KYC, suitability, product selection, and account opening. The solution is fully integrated with record-keeping systems, as well as 3rd party services such as SFDC, Docusign, and PLAID.

- Speed-to-market in 12 weeks from ideation to production with only 6 resources

- Reduced operational risk with automated controls

- Accelerated client onboarding times by 60%

About Unqork

Unqork is the industry pioneer no-code enterprise application platform that helps large companies build, deploy, and manage complex applications without writing a single line of code. Organizations like Goldman Sachs, Liberty Mutual, the Cities of New York and Washington, DC and Maimonides Medical Center are using Unqork's drag-and-drop interface to build enterprise applications faster, with higher quality, and lower costs than conventional approaches.

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