ncs
making IT happen

If You Fail to Plan
You Plan to Fail

Private Wealth

| Financial Services |

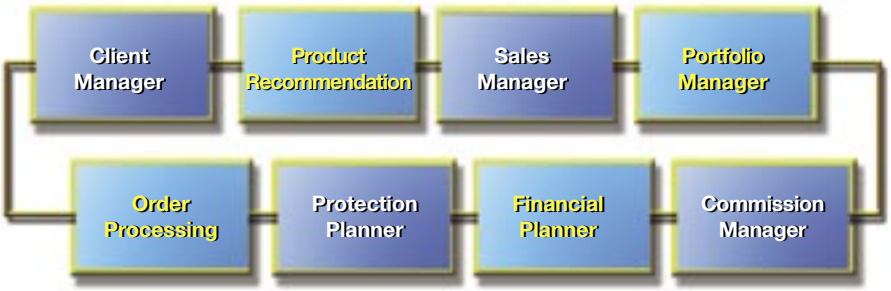
Providing Effective Cross-selling for Banks and Financial Service Providers through Financial Counselling

The NCS Financial Services Industry Practice provides end-to-end IT services and a comprehensive suite of FSI solutions. As the preferred partner of leading global financial institutions, you can count on us for your consulting, application development, systems integration and outsourcing needs.

Overview

NCS Private Wealth is a multi-channel (web, in-branch, mobile) enterprise-wide sales and counselling workbench for professional advisors and individuals. This intelligent personal wealth planner integrates goal planning, portfolio simulation and management, product matching, order fulfilment, investment tracking and plan reviews. Its process-driven and intuitive interface enables users, consumers and advisors alike, at all levels of financial knowledge to effectively plan their financial future.

The modules available include:



Future-proof your **wealth** with NCS Private Wealth

Our Value Proposition

NCS Private Wealth provides comprehensive and intelligent financial planning, asset allocation, product recommendation, portfolio tracking and transactional capability.

Benefits

CLIENT MANAGER

Better Understand your Customer and their Loved Ones – NCS Private Wealth enables the capturing of valuable client and family information, financial background and preferences pertinent to financial planning. Birth dates are also captured to prompt NCS Private Wealth's follow-up during special occasions.

FINANCIAL PLANNER

Financial Health-check and Risk Profiling – As a value-add service to your customer and to provide a base-line for financial planning, NCS Private Wealth enables the capturing of balance sheet items, risk preferences and other financial data. The aim is to derive financial ratios such as debt-equity ratio and personal risk profile for a quick and effective financial assessment.

Facilitates Financial Counselling – Your customers' financial goals are your advisors' sales targets. NCS Private Wealth assists interactive joint sessions between customers and advisors to uncover and discover their financial goals – retirement, child education, self-development, asset acquisition or simply wealth enhancement.

PROTECTION PLANNER

Assures your Customer – Helps your customers accurately assess their current and future exposure and the amount they need to insure themselves and their loved ones, now and into the future. NCS Private Wealth takes into consideration the current situation of the customer and his family, coupled with their future goals, to derive the total protection needs of the customer - medical, general and life insurance.

PORTFOLIO MANAGER

Product Recommendation – Once gaps are ascertained, the appropriate financial instruments are then short-listed from the product database and displayed for consideration. It enables online product brochures to be displayed at a click of a button to facilitate discussion.

SALES MANAGER

Sales Tracking – Sales activities are tracked at the main branch, sub-branch, supervisor and individual advisor levels. It also tracks by product sales volume or time periods.

Functions

Extensive Domain Knowledge - NCS Private Wealth has been jointly developed by in-house consultants and external industry experts, drawing on a wealth of market knowledge and experience.

Effective Educational Tool - Difficult financial concepts are made easy as customers are able to understand the reasoning of the financial advisors.

Multi-Product Offerings - Supports the marketing and sales of multiple financial products such as unit trusts, securities, foreign exchange, derivatives, loans, insurance, deposits, collectibles and real estate, as well as planning tools from wills to trust services.

Straight-Through Processing – Allows real-time straight-through transaction, processing and e-submission, automating time-consuming tasks of application-to-application integration in diverse business settings.

Open-Standards - Adopts the latest open-standards technology to ensure extensibility, re-usability, ease of maintenance and ability to deliver dynamic content to users.

Multi-Channel Access - Supports web, in-branch officers and mobile advisors through notebooks, desktops, WAP devices and PDAs.

Modular Design - Allows phased deployment to suit needs of different organisations and clients.

Rule-based Techniques - Facilitates decision support during financial planing process and easy configuration to suit regulatory and business practices.

Multi-language Support - Double-byte enabled and easy configuration to support different languages.

Offline Capability - Allows off-line fact-finding modules with batch processing capabilities for mobile advisors.

Connectivity Adapters – Connects readily to multi-platform systems.

Real-time Reports – Take-away reports are available instantly.

Contact NCS today!

As the region's leading IT and communication engineering solutions provider, NCS Group aims to work closely with customers to create business value through the innovative use of IT. With proven experience and expertise in consulting, development, integration and managed services, we bring end-to-end support for your organisation's entire technology life cycle. For more information, please visit www.ncs.com.sg.

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