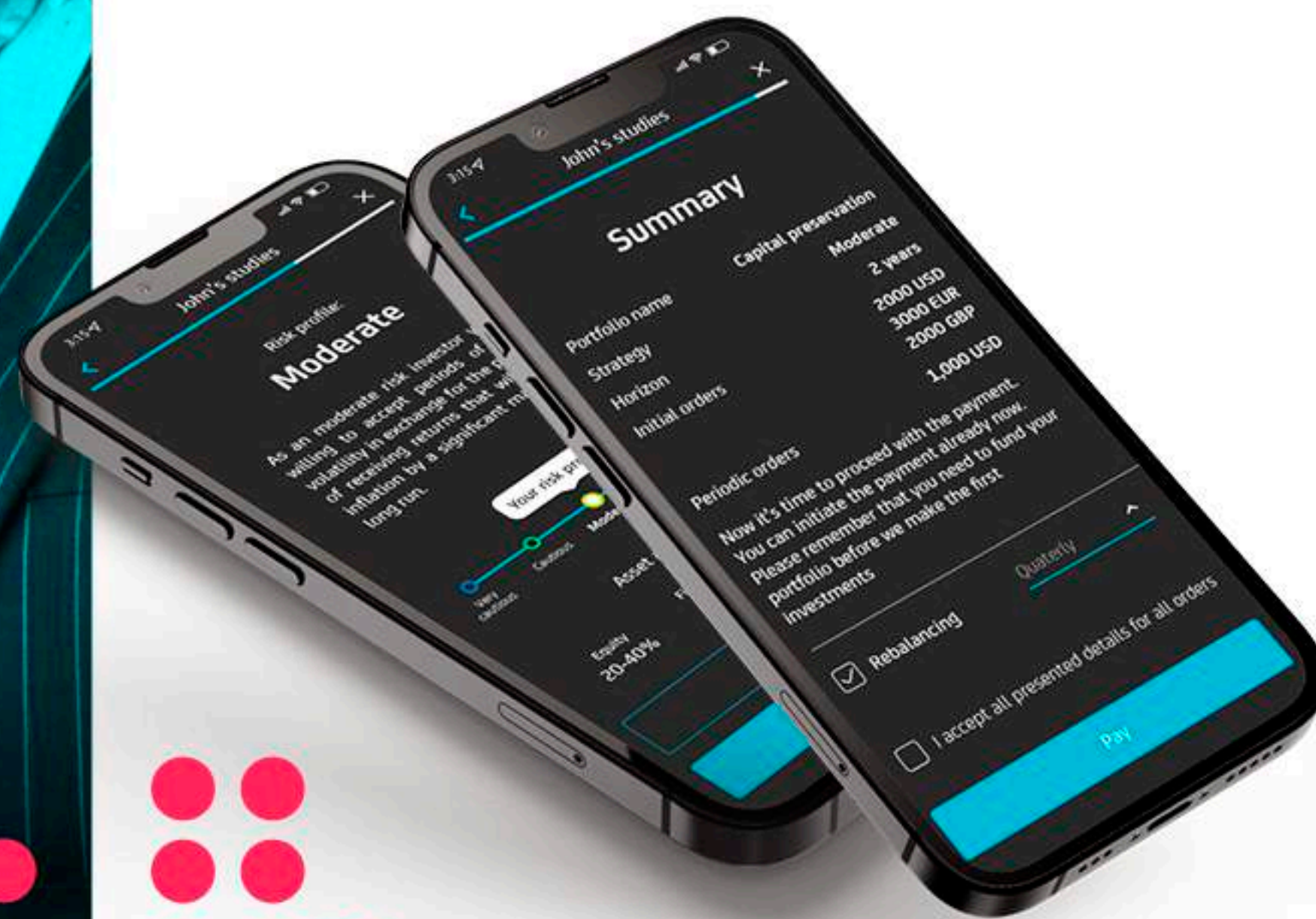






## We built our system to guide your clients to the right investment decisions, step by step.

No matter which segment they belong to, or how experienced they are, they will receive service at the highest level.



Streamline customer journey from investment onboarding to execution with the Robo-advisory module of Comarch Wealth Management – **Client Front-End**. The module will help you automate rebalancing and execution processes, as well as maintain full control over product offering, compliance, and suitability limits.

**Hyper-personalized experience** aligned with values your customers share: impact investing, trending themes, geographical/sector focus, and more, to make them love the portfolio they get

**AI-powered investment insights and state of the art portfolio-building algorithms** designed to maximize customer's profits

**All in an end-to-end, fully automated process, from onboarding to payment and execution.**

**Engaging content and investment ideas** for self-driven or assisted wealth journey



## Key features



Compiling client needs and creating goals



Customer onboarding



Risk profiling together with sustainability preferences



Proposing and simulating model portfolios



Reviewing and rebalancing portfolios

In addition to the Robo-advisory module, CWM – **Client Front-End** ensures consolidation and overview of investments, comprehensive reporting on portfolio performance, delivery of research and content, communication capabilities, as well as execution of orders. The solution can be integrated with external systems for data exchange, including Comarch Wealth Management – Advisor Front-Office for hybrid advice and service.



# COMARCH

## CONTACT

Visit [www.comarch.com](http://www.comarch.com) for the contact information of our offices in the following countries:

<b>Albania</b>	<b>Panama</b>
<b>Argentina</b>	<b>Peru</b>
<b>Australia</b>	<b>Poland</b>
<b>Austria</b>	<b>Russia</b>
<b>Belgium</b>	<b>Saudi Arabia</b>
<b>Brazil</b>	<b>Singapore</b>
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<b>Malaysia</b>	<b>USA</b>
<b>Mexico</b>	

## ABOUT COMARCH

Founded in 1993 in Kraków, Poland, Comarch prides itself on being one of the leading software houses in Europe with a few thousand employees worldwide and thousands of successful projects carried out for the largest international brands.

With many years of experience in the industry, Comarch Financial Services, a business sector within the Comarch Capital Group, specializes in developing sophisticated software and IT systems for major financial institutions in banking, insurance and capital markets.

Our expertise has gained worldwide recognition and a significant portfolio of clients among insurers, banks, mutual and pension funds, brokerage houses and asset management companies in more than 30 countries.

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