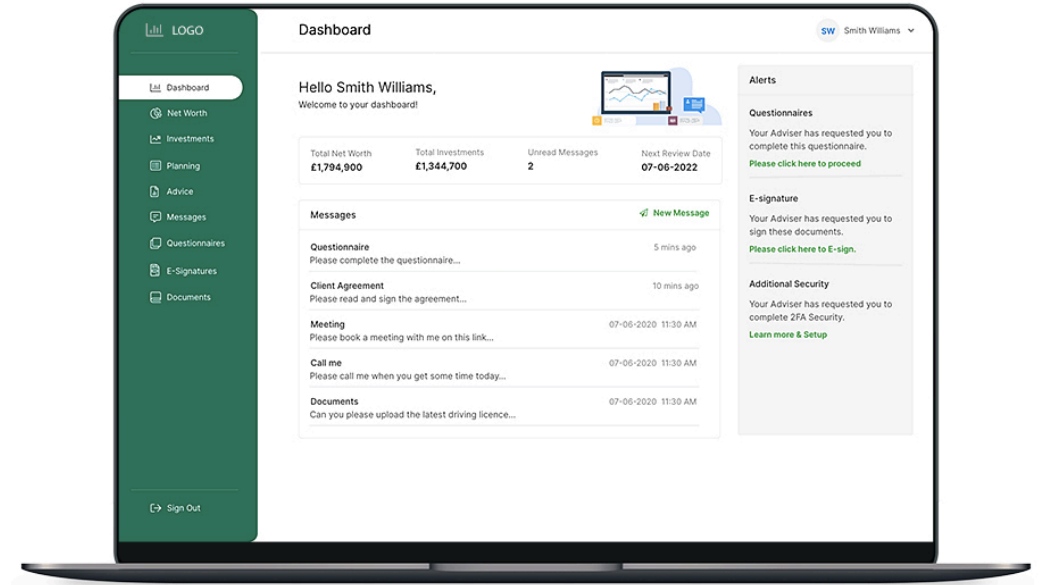




WealthObjects

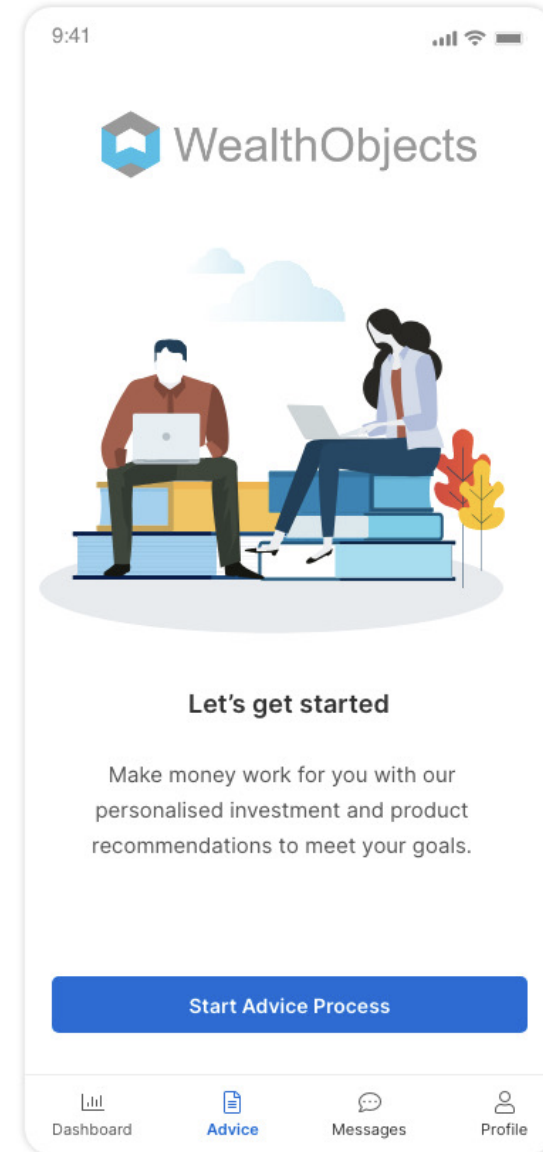
PRESENTATION



WealthObjects is committed to transforming wealth management into a dynamic, digital experience that is both accessible and engaging for everyone.



**WealthObjects is an
all-in-one wealth
advisory platform
enabling firms to
run their business
out-of-the-box
100% digitally**



Current Wealth Software Ecosystem

- Multiple Silo systems
- Legacy interfaces
- Slow/bad integrations
- Manual re-entry of data
- Paper based
- High costs
- Poor digital experience for Relationship Managers and Clients

Practice Management/CRM
Client Acquisition/Fact-finds
Risk Profiling
Financial Planning Tools
Report Generation
Client/Investor Portal
Messaging Tools
E-Signatures
Mobile Apps
Document Management
Portfolio Management
Applications



WealthObjects: A Fully Integrated Solution

- By seamlessly integrating all layers of this Wealth infrastructure into one all-in-one software we provide huge costs savings, significantly simplify business operations and increase end customer engagement of the advice processes.

Practice Management/CRM; Client Acquisition/Fact-finds; Risk Profiling; Wealth Planning; Report Generation; Client/Investor Portal; Messaging Tools; E-Signatures; Mobile Apps; Document Management; Portfolio Management; Applications



WealthObjects: Product Features



Intuitive Interface and Apps



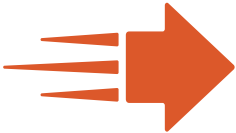
Elegant Client Portal



Radically Lower Costs



API Integrations to any Systems



Launch Features Fast



Eliminates Paperwork



Saves Time

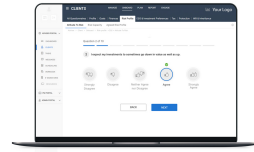


Fully white-labeled to your branding

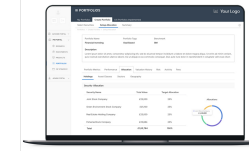


PLATFORM PORTALS

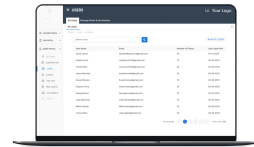
MANAGER PORTAL



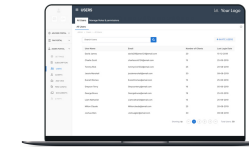
ADVICE AREA
Part of Manager Portal



PORTFOLIOS AREA
Part of Manager Portal

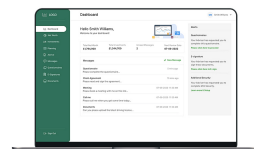


OPERATIONS AREA
Part of Manager Portal

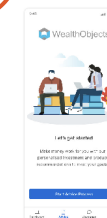


ADMIN AREA
Part of Manager Portal

CLIENT PORTAL



CLIENT PORTAL
Separate from Manager Portal



MOBILE APPS
For Manager and Client Portals





About Us


WealthObjects software is built, operated and owned by WealthObjects UK group, an award-winning wealth technology firm.


WealthObjects is a B2B FinTech company that provides innovative and compliant digital wealth solutions to the financial services sector. Our expertise lies in launching engaging and cutting-edge investing and advisory platforms using APIs and end-to-end SaaS methods. Our technology and client solutions have earned numerous awards and accolades, solidifying our reputation as one of the trusted B2B FinTech companies in the industry.



Thank you

WealthObjects is committed to transforming wealth management into a dynamic, digital experience that is both accessible and engaging for everyone.

 <https://wealthobjects.com/>

 @wealthobjects

 info@wealthobjects.com