

# Xpedition

## FS Xcelerator for Wealth Management

Powered by Microsoft Dynamics 365  
and Power Platform



Transform the future of your wealth  
management firm and enhance your  
end-to-end client experience.



Advancing technology and regulatory changes aimed at improving compliance are forcing significant transformation in the wealth management sector. As we move more towards hybrid working, those that are already embracing newer technologies are not only fit for the future but able to offer enhanced client experiences.

With many wealth managers still using outdated legacy platforms, Excel or even paperwork to onboard and manage their clients, now is the time to transform and leverage the right technology, stay compliant and achieve more for your clients.

It's time to make efficiency gains, lower risk and enhance business process management, so you can deepen relationships with your high value clients, increase market share and meet regulatory requirements.

## The FS Xcelerator for Wealth Management

Powered by Microsoft Dynamics 365 and the Power Platform, the FS Xcelerator for Wealth Management is designed specifically for the needs of your firm. It leverages the best of Microsoft's cloud services to manage and deliver a premium end-to-end client experience, enhanced through intelligent customer insights. From attracting new clients to maximising customer lifetime value, the benefits are almost limitless.

The solution provides a seamless, and personalised experience for all those involved in wealth management. It supports the entire client life cycle, from acquisition and early-stage qualification to product selection, onboarding, and ongoing client and instruction management.

Self-service allows clients to quickly and easily onboard via a secure portal and instantly start tracking their own portfolio performance, with real-time visibility of all the latest updates.

With the FS Xcelerator for Wealth Management you can quickly update processes to comply with changing regulatory and compliance requirements for managing your clients.



## Key Solution Highlights

- **Frictionless Client Experience:** Giving clients the freedom to engage with you using their preferred channel of communication. It delivers a holistic experience to serve the individual needs of each client, from new investors to institutional and generational wealth stakeholders.
- **Process Management & Automation:** Helps to guide and manage individuals, teams, and departments, whilst providing increased transparency across teams for information sharing and collaboration.

- **Management & Reporting:** Generates and visualises insights about your core business processes and team performance, giving management the ability to identify and address any risks and inefficiencies early on.

- **Security & Compliance:** Ensures client data is managed in a secure and compliant way, giving the right people access to the right data and tools at the right time.



## FS Xcelerator Benefits

- **Strengthen and deepen your clients' experience** to improve retention rates and maximise customer lifetime value.
- **Streamline the entire lifecycle management process** through enhanced visibility and transparency across the firm.
- **Obtain intelligent insights from client data** helping you identify and leverage trends with secure and compliant data solutions.
- **Expand the number of ways that a client can communicate with you** to foster a more interactive, relevant, modern client experience.
- **Stay ahead of regulatory and compliance requirements** by increasing productivity and decreasing the inefficiencies of manual processing.



“We’re using Dynamics 365 to drive end-to-end customer journeys that support quality and compliance through greater visibility. Instead of using multiple solutions to serve one customer, our advisers now have a single tool to support all of their customers.”

Mike Hewitt, Transformation Director, The Openwork Partnership

To learn more about Xpedition visit: [xpedition.co.uk](https://xpedition.co.uk)  
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