

# Solution for Wealth & Investment Managers

Secure Data Connectivity to the Software Solutions Your Customers Demand



**The Ninth Wave platform simplifies connectivity for wealth and investment managers, providing a single, secure point of integration to share data with personal financial management tools, financial wellness apps, and other external software solutions.**

## The Market Need

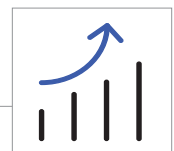
More and more customers want to track their investments - brokerage, 401(k), and other retirement accounts - through a growing list of personal financial management and wellness apps. These solutions increasingly require connectivity to financial data, and the ability to initiate banking transactions "in-app". Serving today's customers requires wealth and investment managers to have a holistic connectivity strategy that embraces complex information about diverse assets.

## Our Solution

The Ninth Wave platform serves as the core of that connectivity strategy for our wealth and investment manager clients. Our platform provides a single, secure point of connectivity between our clients and the mission-critical apps and solutions their customers use every day. Our platform increases reliability, transparency, and security while eliminating the need for screen scraping and its inherent risks.

## About Ninth Wave

Some of the world's largest financial institutions, including **3 of the top 5 U.S. banks** and **9 of the top 10 wealth managers**, rely on the Ninth Wave platform as a single, secure point of connectivity with applications and aggregators seeking permissioned access to account holder data.



## Key Benefits:

**Simplicity:** One connection to Ninth Wave opens access to a growing list of "must have" apps

**Speed:** Quickly deploy our off-the-shelf ecosystem and save years of internal development time and cost

**Customer Experience:** Increase acquisition, retention, and loyalty

**Reduced Risk:** Enhance security and improve regulatory readiness

**Increased Revenue:** Boost profits by monetizing connectivity, while avoiding customer churn

### Out-of-the-Box Connections to the Solutions Customers Need

Ninth Wave powers a wealth and investment manager's connectivity to the third-party applications their customers demand. A single connection to Ninth Wave allows them to quickly and securely share permissioned customer data with a growing list of "must have" solutions - like personal financial management and wellness apps. Customers can obtain a unified view of all their assets - no matter how complex - through whichever app or solution they prefer.

### A Secure Alternative to Screen Scraping

The Ninth Wave platform handles all aggregator traffic, eliminating the risks associated with screen scraping by providing a more secure way for customers to access their financial data through today's popular apps and solutions. Reliability is also enhanced - customers experience world-class connectivity, saving our clients from customer complaints and dissatisfaction each time screen scrapers break from website upgrades or other changes.

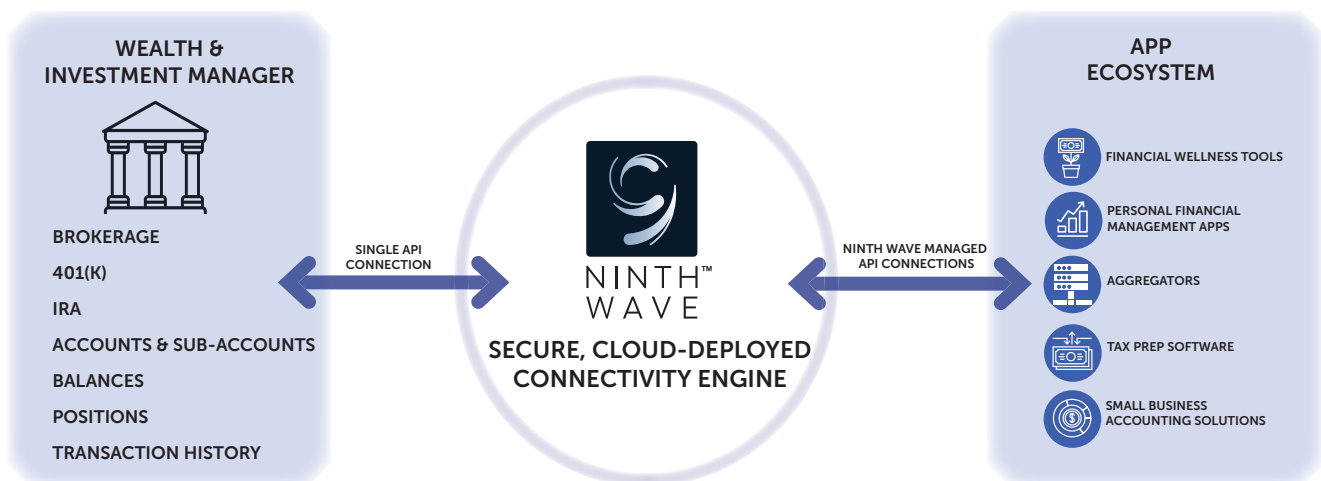
### Fluent in All Data Languages

We leveraged our 20+ years of experience in data standards to build a platform that is protocol-agnostic. Whether it's a version of one of several industry standard protocols, or custom APIs, we have our clients covered. Additionally, we continue to stay at the forefront of financial data - including the first commercially-available Financial Data Exchange (FDX) engine - future-proofing connectivity for our clients and their customers.



### Find Out More

To learn more about the Ninth Wave platform, and how it can help your organization succeed, visit us at [www.ninth-wave.com](http://www.ninth-wave.com), or email us at [info@ninth-wave.com](mailto:info@ninth-wave.com).



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