

Data Aggregation for Ultra-High Net Worth Advisors



Ultra-High Net Worth (UHNW) advisors must have the ability to provide clients with a 360-degree view of their entire portfolio, which requires access to data held company-wide within the wealth management firm.

Several wealth management firms have deployed Ninth Wave Consumer and Commercial Banking and Ninth Wave Wealth Management platforms to aggregate client data (including “assets held away”) stored in disparate firm-wide systems.

The solution, using the Ninth Wave Platform, was designed to handle complex household and accounting relationships. This allows support of family advisors and commercial accounts often where an individual/corporation, or accounting firm, has legal access to many parent and child accounts. It also provides “Officer” access to company assets of LLCs, family trust funds, non-profit funds, corporate accounts and other financial relationships.

Highlights:

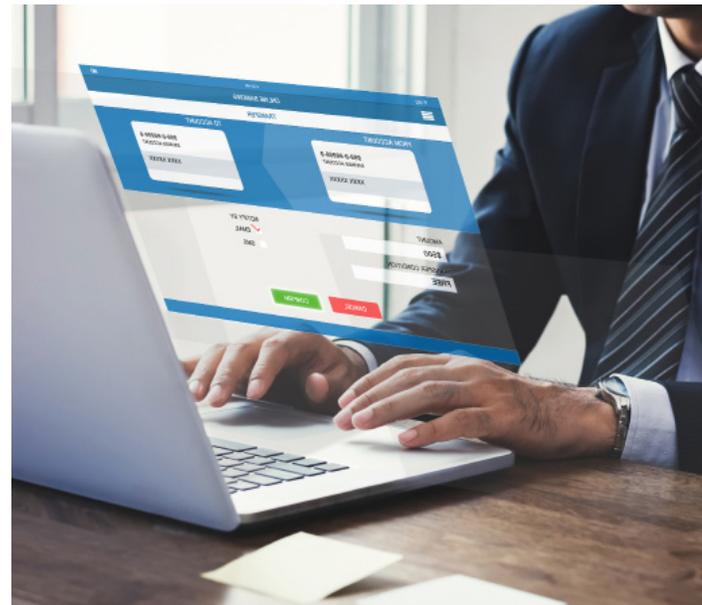
Ultra-High Net Worth advisors must have the ability to provide clients with a 360-degree view of their entire portfolio, which requires access to data held company-wide within the wealth management firm.

The Ninth Wave Platform helps this organization to aggregate client data - including assets held away - with seamless handling of complex household and accounting relationships.

In addition to providing the aggregation platform, Ninth Wave also co-developed an equity evaluator application using the aggregated data to help advisors provide guidance in the areas of: single stock risk, sector risk, advisory billing, and holistic performance reporting for their complete portfolio.

The equity evaluator also uses data from external banks and wealth managers, client files, pricing systems and sources (e.g. Bloomberg) and other industry-standard feeds across asset classes. In addition, sophisticated data models that align with a wealth management firm's business model, including client relationships, were also part of the solution provided by Ninth Wave.

The combination of the Ninth Wave's platform and financial service expertise resulted in an industry-leading solution providing a 360-degree view as well as advisory applications for UHNW wealth managers.



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, or email us at info@ninth-wave.com.
