



Mobile Integrated
Advisory Solution (MIAS)
for financial advisors



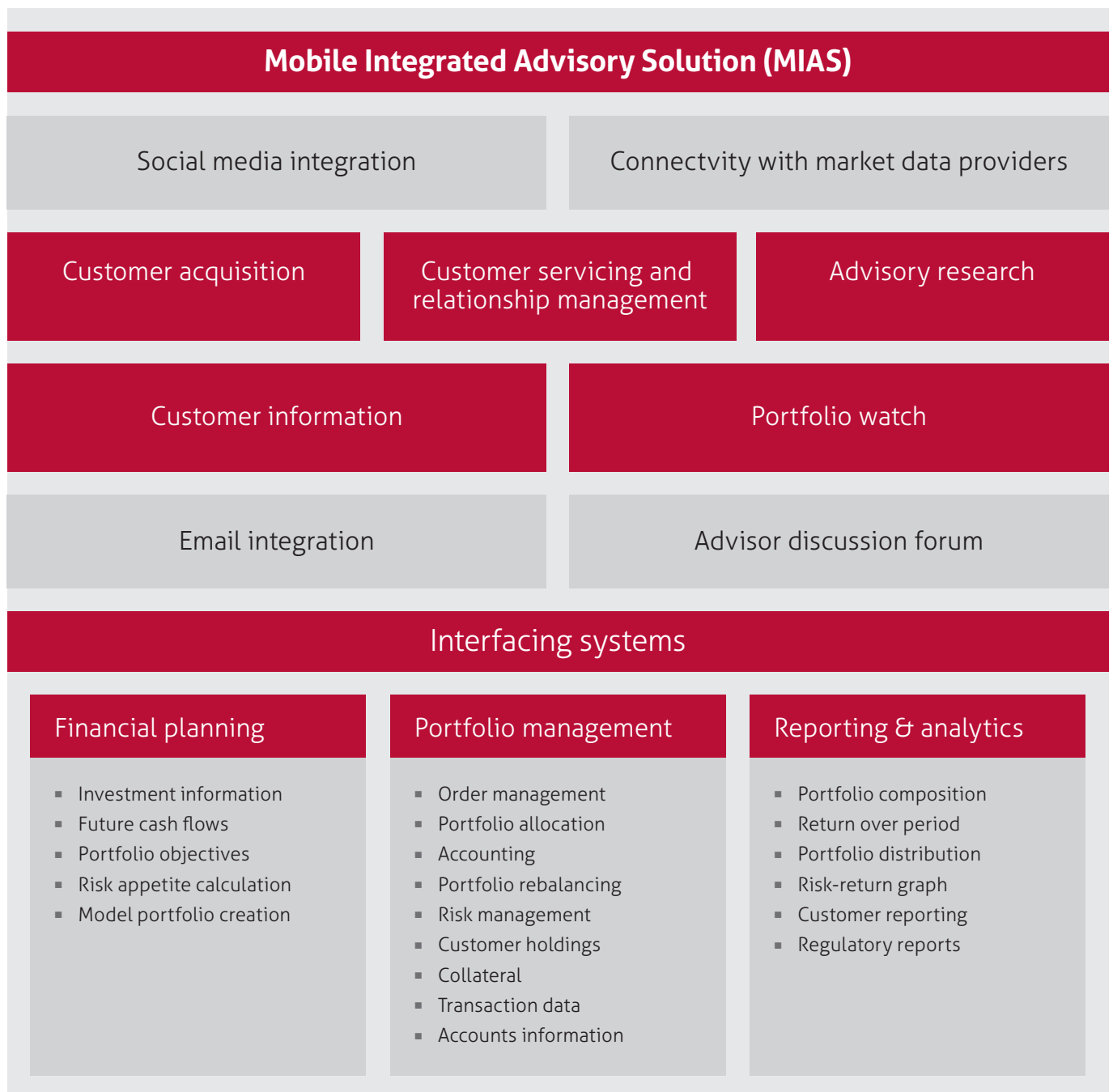
Welcome to possible

Mindtree Mobile Integrated Advisory Solution (MIAS) is an iPad application that provides financial advisors a unified view of all customer and portfolio data.

Its in-built Customer Relationship Management (CRM) functionality leverages social media to enhance customer reach. It seamlessly integrates with other systems of the investment advisor for financial planning and portfolio management. This helps provide a complete front office solution. Moreover, MIAS being an iPad compatible solution, enables the advisor to access customer data – anywhere, anytime.

Solution map

The diagram below highlights the components of MIAS solution and its interfacing with other financial advisory systems



Our solution

Integrated Advisory Desktop (IAD) is a hosted solution and runs either on Cloud or Mindtree / customer's server. IAD is supported by its internal data model developed in SQL Server 2012. All the data is received periodically from the customer's data warehouse in XML file format, or by directly integrating with them.

The solution includes the data management activity received from the customer's data warehouse. Data integration, cleansing and harmonization are a part of the solution implementation phase. Online Analytical Processing (OLAP) cubes will be created for better performance of the system. Extract, Transform and Load (ETL) jobs will be created to load source data into IAD database periodically (hourly / daily / weekly).

The iPad application will be circulated through Apple App store. It will be available only in online mode. All data flow from IAD data warehouse to iPad will be in XML format, through web services developed using ASP.Net 4.0.

Key differentiators

- iPad application enables the advisor to access the solution from anywhere, anytime
- Analytical representation of information results in quicker decision making
- Leveraging existing pre-built analytics and data model results in lesser implementation time and lower TCO

Key features

Customer acquisition: MIAS provides the wealth advisor end-to-end capabilities for lead generation and opportunity management. It integrates with social media websites like Facebook, LinkedIn and Twitter, leveraging them for automated lead generation and viral marketing.

Integrated customer and portfolio information: MIAS stores and periodically updates complete household, financial, investment background and account information of the customers. It seamlessly integrates with the portfolio management system to display portfolio information and provides single complete view of the customer. This enables the advisor to improve customer servicing and utilize every cross-selling and upselling opportunity.

Key benefits

- Offers automatic lead generation which integrates with social media websites. This provides timely notification to the advisor, enabling prompt follow up
- Gives 360 degree view of customers, including household and contact details. In addition, it provides financial, investment and background information, including assets under the advisor's management
- Interfaces seamlessly with the portfolio management system for instant access to portfolio information
- Facilitates quick information exchange and faster customer servicing through an advisor discussion forum
- Supports the advisor to gather market information, track market trends and receive opinions of other experts on complex issues

Advisor Research: MIAS has the ability to connect with market data providers such as Bloomberg, Thomson Reuters and Morningstar. It provides the advisor access to all the internal research reports related to investment. It contains links to websites and blogs of legal and investment experts. This empowers the advisor to get the opinion of investment experts on complex investment, legal and regulatory issues. In addition, it enables the advisor gather market information and track market trends.

Contacts

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About Mindtree

Mindtree is a global information technology solutions company with revenues of over USD 400 million. Our team of 11,000+ experts engineer meaningful technology solutions to help businesses and societies flourish. We enable our customers to achieve competitive advantage through flexible and global delivery models, agile methodologies and expert frameworks.