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Integro CX Wealth

Integro CX Wealth provides an aggregated view of wealth for advisers and their clients in a secure, modern and interactive manner

Highlights

- Built using Dunstan Thomas' award winning Integro CX Enterprise framework.
- Pre-built portal solution for Wealth Management advisers and their clients to show total wealth view, including platform valuations, transactions and investment details.
- Powered by Sprint Enterprise Technology's FINIO for simplified integration to platform and back office data.
- Comes pre-packaged with the Form Builder component of Integro CX Enterprise to allow authorised users to create, distribute and complete eforms via the portal.
- Extensible solution allowing the portal capabilities to be customised as desired.

Features

Security

Registration

- Ability for internal administrators to register new users and assign the appropriate roles. If enabled, advisers can also invoke the registration of clients.
- The registration process is securely managed with the use of SMS or email based one-time passwords to verify the identity of the end user.

Login

Standard Integro CX Enterprise security features, including:

- Integro CX Enterprise out of the box authentication
- Single Sign On support via API
- LDAP integration
- Third-party identity providers:
  - Okta
  - Google
  - Facebook
  - Microsoft
  - Twitter
- One-Time Pin integration for two factor authentication:
  - Email
  - SMS by twillio
  - Google Authenticator
  - Authy

Roles

All ICW Wealth functionality is managed by permissions, which are assigned to roles, out of the box ICX Wealth supports the following roles:

Adviser

- The user is associated with an adviser record provided by the back office system, which in turn grants them access to all clients and their accounts, which are serviced by the adviser record.

Client

- The user is associated with a client record provided by the back office system. They will be able to see all their accounts associated with the Wealth management firm and any off-platform assets that have been manually added in Integro CX Wealth.

Internal Administrator

- As well as managing user account registration and maintenance this role also has access to the portal performance monitoring if this has been enabled.

Marketing

- The user with this role will be able to change the marketing content and media that appears on the Adviser and Client landing pages.

Consolidated Wealth

ICX Wealth provides adviser and client portals to view accounts and assets from multiple underlying systems.

FINIO Integration

- Simple, non-technical integration via the FINIO solution
- Support for the following platforms:
  - 7IM
  - Aegon ARC (via Origo Hub)
  - AJ Bell
  - Ascentric
  - Aviva
  - Brewin Dolphin
  - Canada Life
  - Embark (via Origo Hub)
  - Funds Network
  - HC Digital Wealth Solutions
  - Hubwise
  - James Hay
  - L&G (via Origo Hub)
  - Novia
  - Nucleus
  - Pershing
  - Prudential (via Origo Hub)
  - Quilter
  - Standard Life
  - Transact
  - WealthTime
- Intelliflo Office support

Manual Assets

- The ability to add manually valued assets that are not provided by the platform or back off feeds (e.g. property, cryptocurrency,etc) and for these to be included in the consolidated wealth view.
- Visibility rules to state whether the asset is advised or non-advised and whether it is visible to the adviser.

Form Builder

- The ability for authorised users to create their own eForms using the Integro CX component library.
- Created forms included easy to define validation rules and help text for ease of population.
- Separate permissions for users to distribute eForms to end users.
- eForms are accessible to users via their portal to complete and return.
- Full management of distributed forms to track completion rates.
- Completed forms can be exported to CSV.
- Additional custom API available for system integration of completed results.

Modern Responsive Design

- Designed using Neomorphic principles.
- Supports white labelling.
- Engaging user customisable marketing content.
- Revised charting components to present engaging meaningful content to end users.
- Fully responsive design, with distinct mobile, tablet and desktop breakpoints.

SharePoint 365 Document Repository

- Out of the box integration for SharePoint 365 for use as a document repository.
- Documents can be uploaded and shared between client and adviser.
- Read/unread flags.

Secure Messaging

- Secure intra-portal communication.
- Supports Client to Adviser or Internal user and vice versa.
- Allows documents to be attached to messages (subject to size and type).
- Allows eForms developed via Form Builder to be distributed to enable more tailored distribution of forms.

Financial Express Integration

- Out of the box support for Financial Express.
- Daily price feeds.
- Fund Fact sheet and KID/KIID links.
- Maps showing geographic investment distribution.
- 120 day breakdown of investment price performance.

Notifications

- Out of the box support to notify the user based on:
  - New document available.
  - New secure message received.
  - New eForm received.
- Users are notified via:
  - Email
  - Real time on screen pop ups