WealthLink

Investor & Advisor Portals

A self-serve and on-demand solution to access financial data

With investor behavior continuing to trend towards web-based services and solutions, it is a necessity for wealth providers to offer digital channels to retain and grow their business. Financial organizations need to deploy self-serve solutions that offer clients and end customers an easy access to their financial and account data needed for making informed decisions on their portfolios.

LTIMindtree understands that the financial services industry is at a pivotal juncture as it deals with evolving customer expectations, new technologies, and new distribution models. The WealthLink Investor & Advisor Portal solution provides investors and advisors with convenient, web-based access to valuable, real-time financial information in a secure and encrypted portal.

Why WealthLink™

LTIMindtree's secure, 24x7 web portal solution serves investors and advisors.

Offers improved customer decision support through instant access to accurate account financials, and custom landing pages displaying the most requested information.

Provides superior online customer experience via simplified navigation, reduced clicks, better data findability, and a rich, device-agnostic UI.

Reduces cost-to-serve with intuitive self-serve features:

- Secure e-delivery of investor documentation.
- User self-registration.
- Flexible, role-based user access policies.

Quick deployment of out-of-the-box web solution with easy personalization.

Lowers your operational costs with end-to-end support and maintenance by LTIMindtree.

The WealthLink™ Advantage

Ease-of-use

Your customers can securely access all their investment portfolios via a feature-rich internet portal.

White-labelled & customizable UI

WealthLink applications are bilingual and offer a host of customizable UI elements to align with your corporate brand and product lineup.

Robust service-support capabilities

WealthLink Investor

Investors have access to their financial portfolio details:

- Provides all data and tools for tracking investments - Performance, capital gains/ losses, transactions.
- Account details and financials.
- Paperless investor document hosting - Statements, tax forms, transaction confirmations.
- Insurance wealth support - annuitant, beneficiary, deposit information.
- Account redemption calculator.
- Ad-hoc financial statement generation.
- Advanced search and data filtering capabilities.

WealthLink Advisor

Advisors, dealers, and the management company have the same access as the investor application, with the addition of advisor level details, including:

- Tools, data, and insights relating to an Advisor book of business - AUM and DSC information.
- Compensation details – Transaction commissions and service fees.
- Role-based access – Advisor, multi-book reps, dealer, and call center/administrator access.
- Bulk requests of investor document – Advisors can retrieve hosted documents for all their accounts in one request.

Comprehensive Application Support

Hosting and Maintenance
all hardware & software is included and managed by LTIMindtree Canada in our Tier-3 data centers.

Full Continuity of Business (CoB) capability
Rapid application recovery to quickly address Disaster Recovery (DR) events.

Product support and service monitoring
24x7 application availability support, and ample production support.

Secure, 24X7 application availability

Enhance employee experience, optimize and digitize business workflows, and enable self-service capabilities to drive organizational productivity.

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Headquartered in Mississauga, Ontario, LTIMindtree Financial Services Technologies Inc. ("LTIMindtree Canada") is a wholly owned subsidiary of Larsen & Toubro Infotech, a leading global technology consulting and digital solutions company.

With over two decades of rich experience, LTIMindtree Canada with its flagship product – Unitrax® – a SaaS-based transfer agency record-keeping suite, is one of the leading wealth and asset management platform in Canada, with Assets Under Administration in excess of CAD $1Tril+, enabling fund manufacturers and insurance providers to address their record-keeping needs across the product spectrum such as Mutual Funds, GICs, Hedge Funds, Alternative Investments, Institutional Funds and Insurance Wealth Products – all under one platform.

LTIMindtree Canada has a deep understanding of disruptive technologies, and partners with top Canadian financial services firms to accelerate digital journeys of its clients through end-to-end consulting and implementation solutions, Smart Automation and Advanced Data Analytics, Cloud Infra & Security, Assurance Services and Business Process Management. For more information, please visit **https://www.ltimindtree.com/canada/**