

Wealth management for the modern era

Our Agile solutions accelerate innovation

“Our strategy is to solve for the modern era of wealth investing by innovating digital human experiences and transforming ecosystems for new age investors.”

Why innovation matters now more than ever

Digital strategies are accelerating as the increasing demands of new millennial investors converge with the changing needs of modernization and established investors.

How do you innovate rapidly – in the right ways – when behaviors and expectations are changing so much and so fast?

It's time to step up your transformation innovation. This includes investing in human-centered design and cyber-security, while supercharging your customer experience (CX), and increasing client and wealth manager engagement.



Human-first



Enhanced user impact



Security and trust



Improved system



Data and measurement



Ease of use



Increased engagement



If you're not modernizing experiences, **you're missing investment opportunities**

Firms that have already reached an advanced digital stage

8.6%

increase in revenue

11.3%

rise in productivity

6.3%

improvement in market share

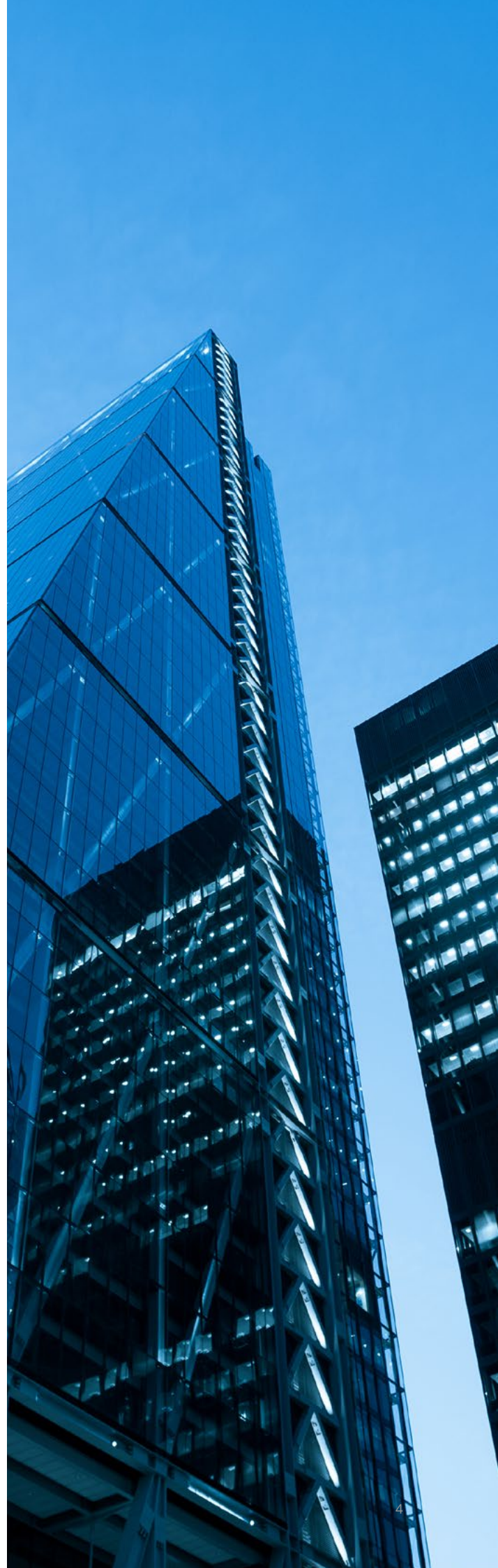
Laggards

\$79M

per \$B of revenue a year is being lost

- Firms have been looking to innovate for decades
- Provable success is achieved by taking small, scalable steps in verifiable stages

Statistics/Data available from <https://www.protiviti.com/US-en/insights/wealth-2022>

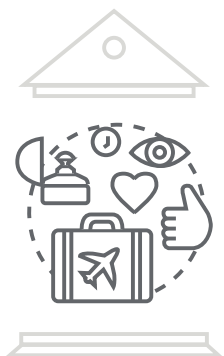


How we help clients attract new age investors

New millennial investors who have attained high wealth need a home for their investments.

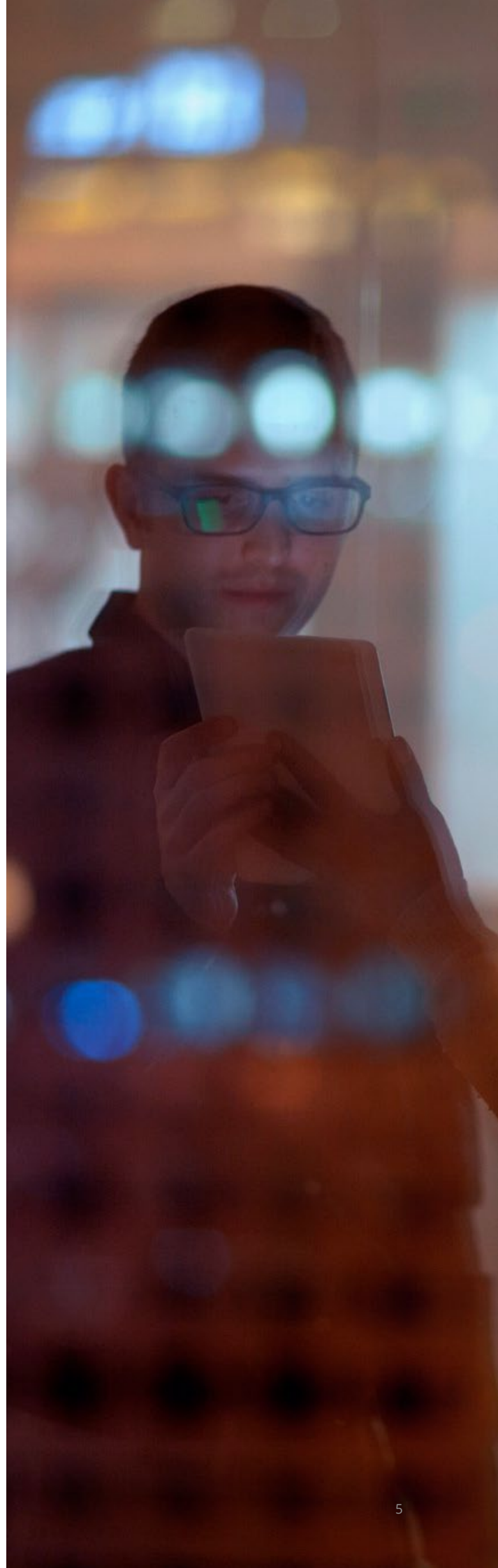
- New investors will be digital natives, almost exclusively
- Innovative solutions are needed for ease of use
- Scaling fintech could offer this immediate-need group a 24/7 digital concierge
- They will have end user experience
- High-level CX is a must for new investors

Our consultants and engineers are developing a clear, seamless and innovative financial management experience for customers



>80%
of millennial heirs will be looking for new financial managers after inheritance in 2022 and beyond¹

1. <https://www.forbes.com/advisor/in/investing/6-golden-financial-planning-rules-for-millennials/>



Partner with our solutions

Our teams of consultants and engineers can provide a clear, innovative and seamless financial management experience for customers.



Discover

Discovery and insights

Gain insight into your current products, services, customers and markets with a broad range of research methods.

Value

- Gives you deeper intelligence
- A big picture perspective
- Allows you to plan and design for innovation

Timing: 3-4 weeks



Design

Product design. Expert review

Find critical usability issues and learn how to optimise your CX and UX for improved customer retention and performance.

Value

- Shows the quality of your user experience
- Provides recommendations on how to reach your KPIs

Timing: 2 weeks



Define

CC maturity assessment

We measure the maturity of your customer centricity as a business and create a strategy to help you prosper.

Value

- Provides an achievable road map for customer-centric change
- Drives positive change for customers and their lifetime value

Timing: 2-3 weeks



Deliver

Product design sprint

This intensive and collaborative design sprint allows you to define a vision and low fidelity prototype, then test and validate it rapidly.

Value

- Enables you to prove the concept without too much investment
- Helps you progress and get to market quickly

Timing: 2 weeks

Get in **contact**

To find out more visit:

luxoft.com/banking/connected-wealth/

Or email:

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About Luxoft

Luxoft is the design, data and development arm of DXC Technology, providing bespoke, end-to-end technology solutions for mission-critical systems, products and services. We help create data-fueled organizations, solving complex operational, technological and strategic challenges. Our passion is building resilient businesses, while generating new business channels and revenue streams, exceptional user experiences and modernized operations at scale.

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