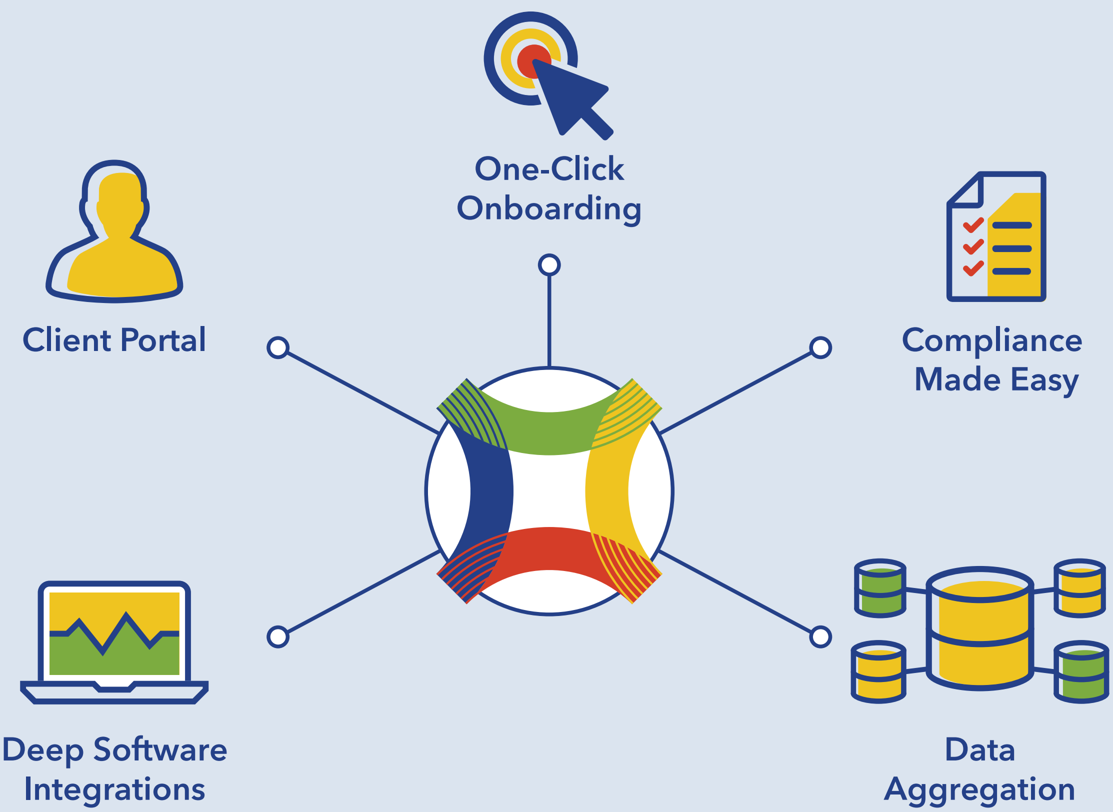
Skience Financial Solutions

Be the best you can be with your clients

Create a phenomenal experience with a CRM system that's been transformed for Financial Services. Skience Financial Solutions boosts the powerful Salesforce® offering to let you work efficiently, deepen client relationships and minimize risks.

Build it the way you want



Skience offers a version for multiple Salesforce® product editions

Add one module, or all five

Client Portal

Meet the demands of an increasingly tech-centric client base with this collaboration center for creating and discussing information about financial accounts.

- Configure the portal's look and feel to be an extension of an advisor's website, and have it launch from there via a link
- Save time and reduce errors by having clients self-register, upload documentation and enter as much account info as possible online
- Let clients view accounts that are part of their household, including details on balances, positions and transactions
- Use workflows to move information into a draft account on Skience for advisors to review, perform necessary validations and generate paperwork for client eSignature

Onboarding

Make your client experiences memorable with innovative capabilities that support a smooth and effortless onboarding process, increasing productivity for all parties involved.

- Leverage timesaving paperless capabilities, such as electronic forms and eSignature options
- Minimize frustrating NIGOs with automatic checks that identify any missing mandatory information
- Accelerate new account opening with straight-through processing to leading clearing firms and custodians

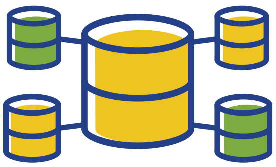
Compliance

Protect your business by making informed compliance decisions that respond to the heightened regulatory requirements Financial Services firms face today.

- Facilitate the capture of account information required by SEC 17a-3 and 17a-4, and meet suitability tests and the impending DOL fiduciary rule
- Access a Trade Blotter across products and vendors, with a workflow and review capability
- Support optional client level reporting for CIP programs and AML and OFAC regulations
- Integrate with rep licensing systems for license checks

Data Aggregation

Deepen client discussions with in-depth analysis and reporting that's driven by one high-quality source of financial data aggregated from over 200 providers.



- Select from a wide range of data providers, including clearing firms, custodians, fund families, insurance carriers and other third parties who serve your clients
- Let the Skience team map the data attributes from the chosen sources to your destination data structure
- Tap into a clean, comprehensive set of data that's automatically updated each and every day
- Add your own proprietary information to create a comprehensive Book & Records system

A Partial List of Providers:

- Custodial integrations: Fidelity Clearing & Custody Solutions (Brokerage and Advisory), Pershing® (Brokerage and Advisory)
- Other third-party integrations: eMoney, MoneyGuidePro®, DocuSign, Electronic Verification Systems for OFAC, Quik! Forms, and SpringCM
- Data feeds: Addepar, Albridge, Black Diamond®, Charles Schwab, DAZL℠, DST, DTCC, Envestnet, Fidelity Clearing & Custody Solutions, Pershing®, SEI, and TDAmeritrade

Skience Analytics

Mine data from the Skience Aggregation and Reconciliation module to uncover important insights and trends in investor portfolios.

- Access snapshots of historical information
- Create reports and dashboards
- Observe how key metrics have trended in a book of business over time
- See data "as of" a historical date, for compliance purposes

Put yourself at the center of your clients' financial lives. Contact us today at **info@theathenegroup.com**, or call us at 866 428 4363, to learn more and schedule a demo.

Skience®

About Skience

The Skience product line was first launched over ten years ago after a customized project for a broker-dealer gave the development team at The Athene Group an "aha" moment—wealth management firms wanted a prebuilt technology solution that was flexible, easy to use and worked the way they did.

Today, Skience transforms the Salesforce® CRM platform to meet the specific needs of the Financial Services industry. This has led to Skience being selected as an integral partner for the Salesforce Financial Services Cloud, providing important add-on modules to meet the specific information and workflow needs of advisors, CTOs, COOs, CCOs and more.