

# IMPROVE YOUR GAME

with



Experience the power a unified wealth management operating system can have on your business.



**Skience offers seamless workflow integration; increased advisor productivity; enhanced front, middle and back-office efficiency; and a great investor experience.**

Skience is an industry-leading digital transformation platform that provides wealth managers with an efficient way to unify their technology, increase back-office and advisor productivity, and deliver a great client experience. Offering deep integrations with the industry's leading custodians and technology firms, Skience provides advisors with a fully integrated workspace within a familiar and easy-to-navigate CRM environment.

The platform is built on nearly two decades of experience and problem-solving within the wealth management community. Our clients benefit from practical knowledge, proven solutions, and a thorough understanding of the wealth management industry's compliance structure and regulatory landscape.

## MODULAR

Skience is a modular solution with core features that can be enhanced and customized to the unique

requirements, workflows, and technology needs of the enterprise client. Firms can select modules for specific challenges, or leverage Skience as a comprehensive solution.

## INNOVATIVE

Skience features a technology breakthrough that allows administrators to expand or customize data models, integrations, and application behavior through Skience's data cloud, eliminating costly and frustrating delays caused by custom development work.

In addition, administrators can select and change what elements of data feeds are visible in the CRM, providing wealth managers with control over what data they need to view to form a complete picture of their client's accounts. Most importantly, as advisors expand their service offerings to support new custodians and product manufacturers, Skience's architecture easily accommodates new business lines.

## EFFICIENT

Once the initial implementation is completed, the product is supported through releases featuring new integrations and enhancements. Rather than spending internal development resources and valuable time building out integrations one by one, Skience provides enterprises with a best-in-class advisor desktop at a fraction of the time and cost.

## Features

### Digital Onboarding

Skience offers digital onboarding using a guided workflow solution that integrates multiple providers in a paperless process to minimize rekeying, reduce Not in Good Order (NIGO) transactions, enforce compliant processes, and enable rules-based supervision.

### Client Portal

The Skience client portal gives advisors a collaboration center for working with their clients that can be configured to have the same look and feel as their website.

### Aggregated Client Financial Data

Skience aggregates data from more than 200 sources daily to provide a 360-degree view of your clients' financial relationships.

### Integration with Technology Tools

Skience weaves multiple wealth management providers into business process workflows using API-based integration with context-sensitive single sign-on. Now you can simplify access to third-party offerings and minimize time and errors involved when rekeying.

### Account Servicing & Updates

Skience enables financial account servicing and updating expediently, straight through to your clearing and custody providers.

### Compliance Audit Trails

Skience offers compliance tools to help you effectively manage regulatory and business risk issues.

Privately-held and headquartered in Virginia, Skience delivers innovative digital strategies and solutions that transform businesses. Skience offers advisory and CRM implementation services within the Salesforce ecosystem, as well as an industry-leading, enterprise-class digital platform for broker-dealers and RIAs that provides wealth managers an efficient way to unify their technology, increase back-office and advisor productivity, and set the stage for a great client experience.

Visit [Skience.com](https://www.skience.com) to learn more.

Or contact us at (866) 754-3623 or [info@skience.com](mailto:info@skience.com) to explore how Skience can transform your business.

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