



INNOVATION FOR BUSINESS RESILIENCY

Skience's unified **wealth management platform** offers true digital resiliency, a secure virtual workspace, and streamlined efficiencies to meet the needs of financial services firms now and in the future.

THE NEW NORMAL

Financial services firms have faced an unprecedented amount of organizational change as a result of the 2020 global pandemic. In a short period of time, firms have needed to address and solve the challenge of moving their 100% of their workforce to a remote environment, all at once. At the same time, firms have to stay in close communication with their clients, continue to function and transact business, and maintain the security of their operations and data.

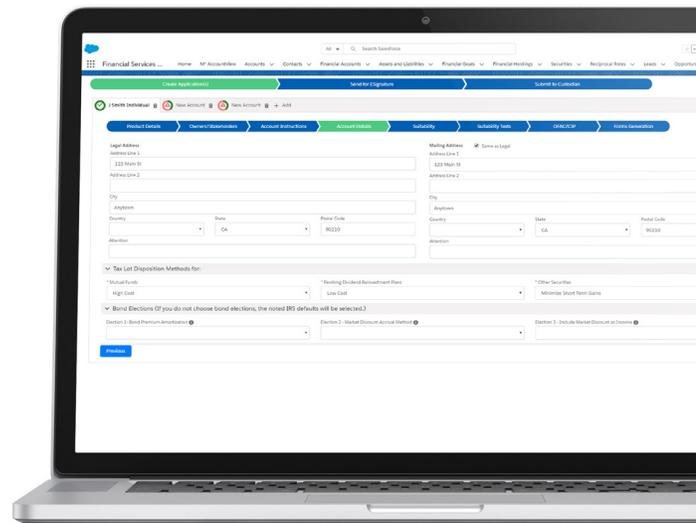
To address all of these challenges in a holistic and cost-effective way, many firms are investing in platforms that meet their needs now, and will enable them to grow and scale over time.

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. Skience is fully customizable and modular, allowing firms to choose which features they need to enhance their existing technology, or select the entire platform for a comprehensive solution.

THE SKIENCE PLATFORM ADVANTAGE

In the current business environment, Skience offers several advantages:

- **Single View of the Customer.** Within a single platform, advisors can onboard new clients, collaborate with clients to collect information to open new accounts, pass that information along to a custodian, collect the completed forms, and deliver them electronically to their clients as a singular signing experience. And firms can monitor transactions, support compliance activity, and leverage data for analysis and insight—all within a single platform.
- **Seamless, End-to-End Digital Experience.** With bi-directional integrations with financial planning software and managed account platforms, Skience offers advisors the ability to enter new information once, and then work efficiently across several systems,



saving time and avoiding errors caused by manual data entry and rekeying.

- **Household-level Multi-Account Opening.** The number of new accounts opened over the past few weeks has increased, in the midst of economic fluctuations, as investors with cash-on-hand have seen opportunities in a down market. With Skience, advisors are equipped to open a range of accounts at one time for an entire household, for improved efficiency.
- **Improved Client Management.** Skience's customizable CRM functionality enables advisors to capture personal client data and leverage configurable workflows that support practice management activities. With Skience, advisors can log into their CRM and have all of their client information at their fingertips—including up-to-date financial account information from data aggregated daily—empowering them to deliver personalized and educated advice.
- **Virtual Communication.** Skience is built on top of the Salesforce platform, offering firms access to a universe of integrated products—including automated marketing and communication tools—that enable advisors to educate and connect with investors on a regular basis. Outside of business hours, the Skience investor portal allows investors to log in independently to view their accounts and reach out to their advisor on their own time.
- **Compliance and Reg BI Solutions.** Skience intertwines advisor productivity with solutions that create back-office efficiencies. The platform features automated

compliance workflows to streamline and document suitability testing, trade exception checks, AML/OFAC checks, and more. Skience also offers both out-of-the-box and customized workflows for the delivery of Form CRS to maintain compliance with the Regulation Best Interest requirements that go into effect June 30, 2020.

- **Innovation and Configurability.** Skience 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. As advisors expand their service offerings to support new custodians and products, Skience's architecture easily accommodates new business lines. Once the initial implementation is completed, the product is supported through releases featuring new integrations and enhancements. Rather than spending internal development resources building out integrations one by one, Skience provides enterprises with a best-in-class advisor desktop at a fraction of the time and cost.
- **Data Management and Security.** Firms need the ability to capture data, enable it to flow freely within the platform to be accessible for business use, and then securely store it for accurate record-keeping. Skience aggregates data from more than 200 product providers (including clearing and custody providers, fund families, insurance carriers, alternative investment and trust providers, as well as proprietary data feeds), makes it available for analytics and reporting, and then encrypts the data for secure storage.

Contact Skience today to request a demo at 866-754-3623.

Privately-held and headquartered in Virginia, Skience delivers innovative digital strategies and solutions that transform businesses. Skience offers advisory and CRM implementation services, 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 to explore how Skience can transform your business.

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